HR305

Configuration of Master Data

mySAP ERP Human Capital Management

Date	
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Participant Handbook

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Material Number: 50079281

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About This Handbook

This handbook is intended to complement the instructor-led presentation of this course, and serve as a source of reference. It is not suitable for self-study.

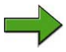
Typographic Conventions

American English is the standard used in this handbook. The following typographic conventions are also used.

Type Style	Description
Example text	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths, and options. Also used for cross-references to other documentation both internal (in this documentation) and external (in other locations, such as SAPNet).
Example text	Emphasized words or phrases in body text, titles of graphics, and tables
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example SELECT and INCLUDE.
`Example text`	Screen output. This includes file and directory names and their paths, messages, names of variables and parameters, and passages of the source text of a program.
`Example text`	Exact user entry. These are words and characters that you enter in the system exactly as they appear in the documentation.
`<Example text>`	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

Icons in Body Text

The following icons are used in this handbook.

Icon	Meaning
	For more information, tips, or background
	Note or further explanation of previous point
	Exception or caution
	Procedures
	Indicates that the item is displayed in the instructor's presentation.

Contents

Course Overview

Implement master data in Human Resources

The information given in this course relates to the following SAP software components and releases:

- my SAP ERP 2005

Target Audience

This course is intended for the following audiences:

- Project team
- Consultants

Course Prerequisites

Required Knowledge

- HR050 Business Processes in Human Capital Management

Recommended Knowledge

- HR110 Business Processes Payroll

Course Goals

This course will prepare you to:

- Implement HR master data in a SAP system

Course Objectives

After completing this course, you will be able to:

- Map your complete company and personnel structure in the SAP system
- Map your pay scale structure and perform standard pay increases and pay scale reclassifications
- Build your own wage type structure and set up the necessary prerequisites for payroll accounting
- Depict enterprise-specific processes in the infotype menus, personnel actions and dynamic actions

SAP Software Component Information

The information in this course pertains to the following SAP Software Components and releases:

Unit 1

Course Overview

Unit Overview

This section is an introduction to the course. The most important goals of the entire course are also given here.

Unit Objectives

After completing this unit, you will be able to:

- Explain the goals and objectives of this course
- Understand the roles and the portals
- Describe the main business scenario
- Set up favorites and user profiles

Unit Contents

Lesson: Course Overview

Lesson Overview

This lesson serves as an introduction to the course.

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the goals and objectives of this course
- Understand the roles and the portals
- Describe the main business scenario
- Set up favorites and user profiles

Business Example

You work for an enterprise that sells bicycles and equipment. You are a member of the project team responsible for implementing mySAP HR.

You work in close cooperation with your colleagues in the HR department, as well as with colleagues from other departments. Your tasks include setting up the SAP system in accordance with your enterprise's requirements and supporting the HR department in their day-to-day activities. Additional tasks include actively cooperating and working with the HR department in all activities that arise daily or periodically.

mySAP ERP

Role Concept

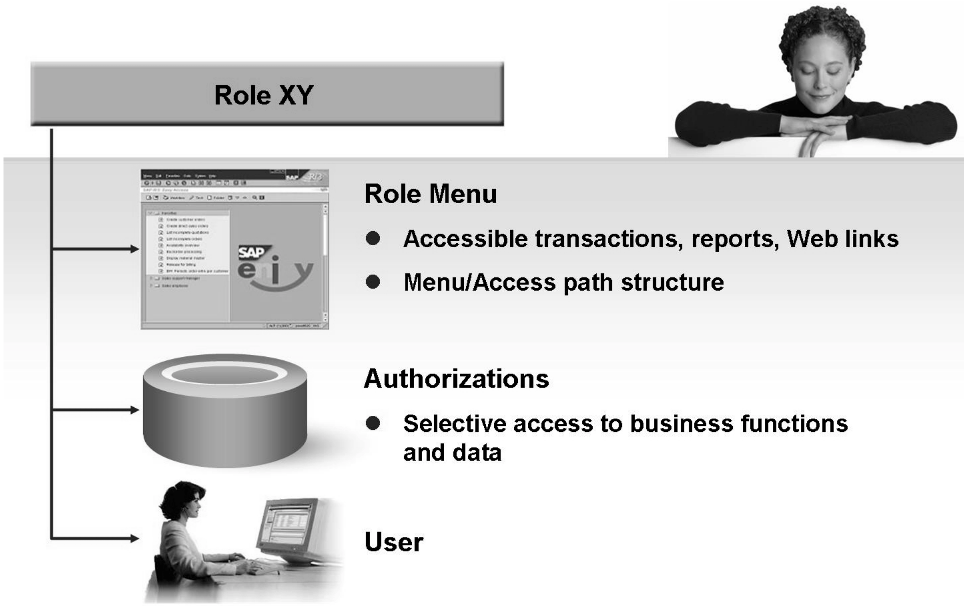


Figure 1: Role Concept

Authorizations and the corresponding menu structure are linked to a role. You then assign a role to users with the same task area.

Enterprise Portal

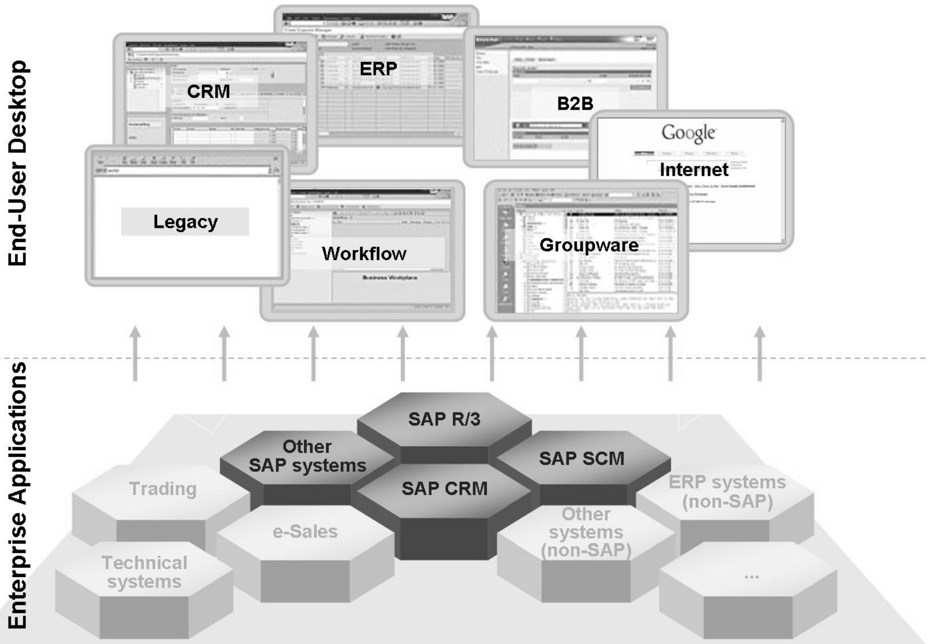


Figure 2: Enterprise Portal: Challenge - Too Many End-User Interfaces

- The e-Business era has often resulted in companies having very complex IT landscapes. These include different applications, services, and information.
- Users need access to the various services to perform their tasks. Access is usually through special programs on the desktop and diverse logons.
- In many companies today, the end user is thus confronted with a range of different interfaces for various applications, each of which operates differently.
- The SAP Enterprise Portal masters this challenge by integrating these various interfaces to just one interface.
- The target group is not limited to the employees of a company - with an external portal you can also reach business partners, customers, or any interested parties.

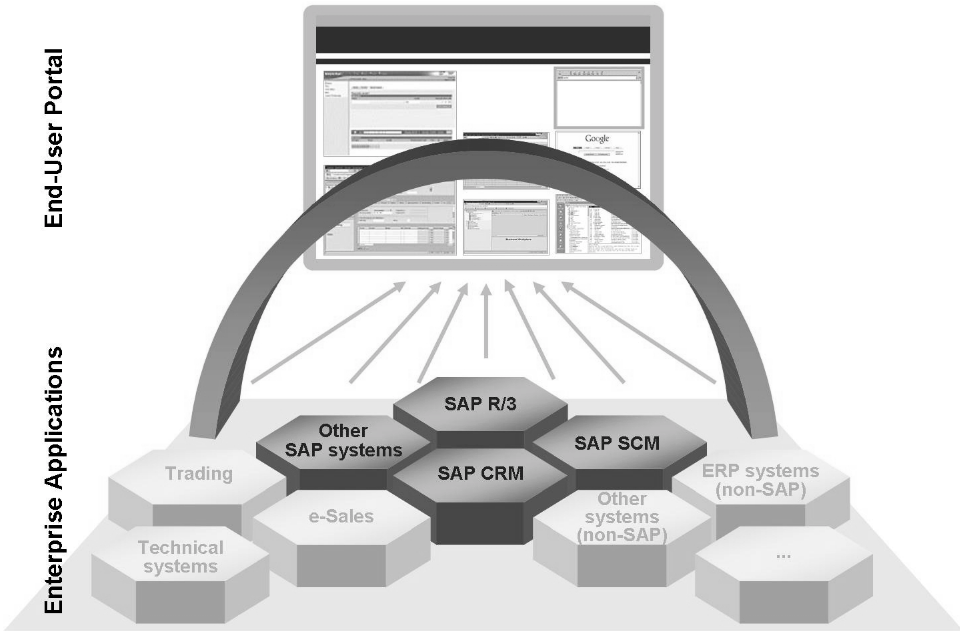


Figure 3: Single-Sign-On in SAP Enterprise Portal

The Enterprise Portal displays information from several sources (SAP systems) on one page. The use only needs to log on once to the Enterprise Portal. If a user and password for the other background systems is saved in the Enterprise Portal for each user, or if the Enterprise Portal has a “Trusted Systems Link” to the systems, then the Enterprise Portal performs all other logons.

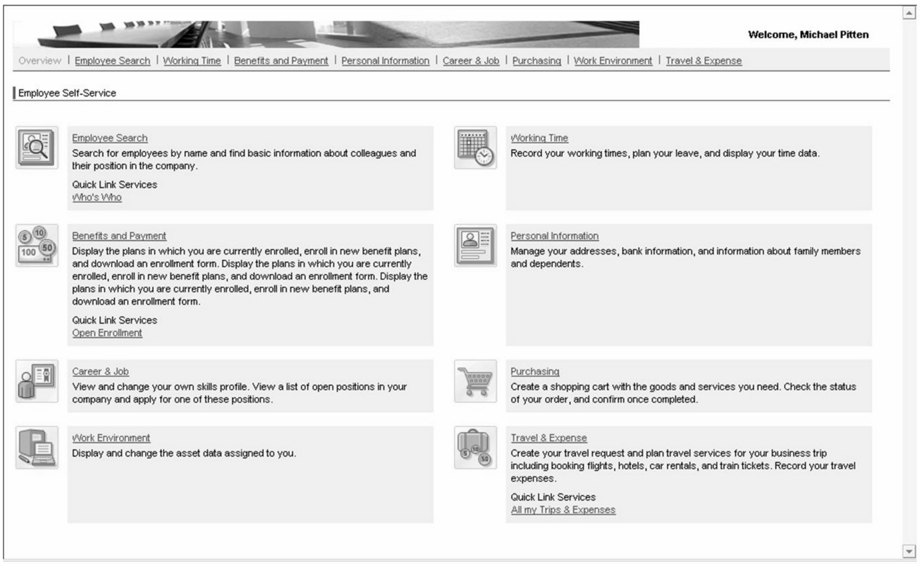


Figure 4: ESS Homepage (Area Group Page)

- The homepage oder area group page is the start page for the Employee Self-Service application.
- The end user can call various information from here.
- For example, the user can start the service to change his or her address data.

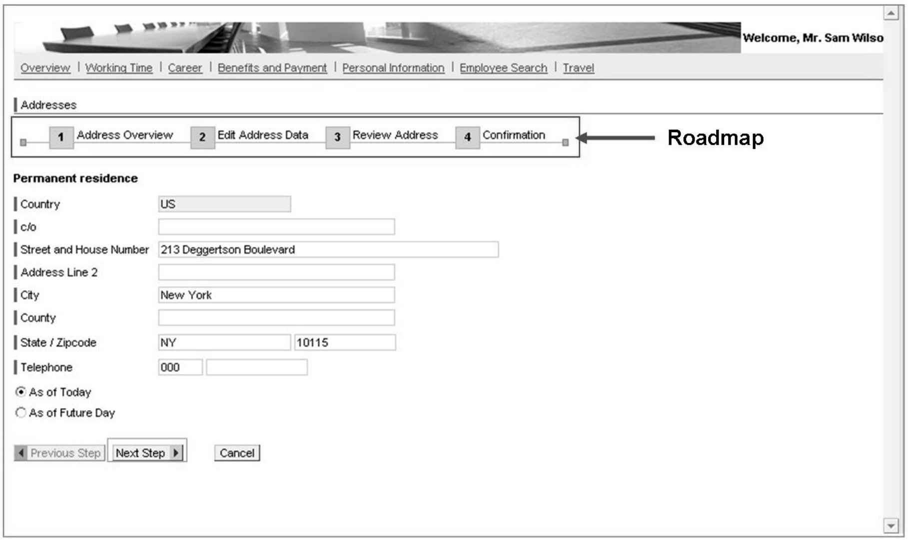


Figure 5: ESS Service: Personal Data - Change Address

- Example: An employee would like to change his or her address.
- The employee is guided through the individual steps of a roadmap.
- The fields to be maintained are displayed in screens that are easy to comprehend.
- When the employee saves the changes, the changes also take effect in the connected mySAP ERP system. During processing, the employee's personnel number is locked in the mySAP ERP system. The system message “Data has been saved” also refers to the data in the SAP system.

User Profile and Favorites

- By setting up a user profile and favorites, you can save yourself work.
- A user profile has the following effect:
  - Predefinition of fields in Customizing and in the application (for example, country assignment)
  - Program control (for example, user group)
- By setting up favorites, you can access frequently used transactions quickly.

Figure 6: User Profile and Favorites

By setting up user profiles, values such as the personnel country grouping can be predefined in Customizing. You can also have a differentiated program control if you enter a user group (see the units on infotypes and actions). By setting up favorites, you can access frequently used transactions quickly.

Exercise 1: Course Overview

Exercise Objectives

After completing this exercise, you will be able to:

- Set user parameters and roles

Business Example

You want to store information in your HR305-## user to make your day-to-day work with the system a lot easier, and assign yourself a role that contains only the transactions relevant for you.

Task 1:

Check if the following user parameters are set:

Note that ## corresponds to your group number, in this case ______.

1. Country grouping (MOL) = 99
2. User group (UGR) = ##+50

   This means, for example, for Group 01 UGR=51, for Group 02 UGR=52, and so on.

Task 2:

1. Assign your user the *T_HR305* role.

Task 3:

1. Which path do you follow in the Easy Access Menu to call master data maintenance?

   ____

Task 4:

1. Save master data maintenance as a favorite and rename it.

Solution 1: Course Overview

Task 1:

Check if the following user parameters are set:

Note that ## corresponds to your group number, in this case ______.

1. Country grouping (MOL) = 99

   a) Menu: *System → User Profile → Own Data*

      Choose the *Parameter* tab page.

      Make the following entries:

   b) Country grouping (MOL) = 99

2. User group (UGR) = ##+50

   This means, for example, for Group 01 UGR=51, for Group 02 UGR=52, and so on.

   a) User group (UGR) = ##+50.

   b) This means, for example, for Group 01 UGR=51, for Group 02 UGR=52, and so on.

Task 2:

1. Assign your user the *T_HR305* role.

   a) On the initial screen, choose *Other Menu* and select the *T_HR305* role (double click).

   b) Choose *Assign users* and enter your user ID (HR305-##). In the dialog box that appears, confirm the automatic user master comparison by choosing *OK*.

Task 3:

1. Which path do you follow in the Easy Access Menu to call master data maintenance?

   ____

   a) *Human Resources → Personnel Management → Administration → HR Master Data → Maintain*

Continued on next page

Task 4:

1. Save master data maintenance as a favorite and rename it.
   a) Move entry to Favorites folder using Drag&Drop
   b) Rename: *Right mouse key → Change Favorites*
      Or: *Favorites Menu → Change*

Lesson Summary

You should now be able to:

- Explain the goals and objectives of this course
- Understand the roles and the portals
- Describe the main business scenario
- Set up favorites and user profiles

Unit Summary

You should now be able to:

- Explain the goals and objectives of this course
- Understand the roles and the portals
- Describe the main business scenario
- Set up favorites and user profiles

Unit 2

Hiring an Employee

Unit Overview

In this section, an employee is hired by our company. The application side of the products is also illustrated.

Unit Objectives

After completing this unit, you will be able to:

- Discuss the special features of Human Resources in your company and describe the enterprise structure
- Hire a new employee

Unit Contents

Lesson: Hiring an Employee

Lesson Overview

Hiring an employee in our company with the help of a personnel action.

Lesson Objectives

After completing this lesson, you will be able to:

- Discuss the special features of Human Resources in your company and describe the enterprise structure
- Hire a new employee

Business Example

You are an administrator in your company. The company has implemented a variety of SAP products. You are responsible for the Personnel Management component.

Until now, you have been more involved in the application side of the products. In the future, you want to be more involved in the implementation of the Human Capital Management system.

General Structure of Your Company

Figure 7: You Are a Personnel Administrator in Your Company

Your company sells bicycles and accessories. Head office, Sales, and Purchasing are located on the same site.

A year ago, the company decided to restructure the existing IT systems. The company chose to replace the old systems with the mySAP ERP system. All components were implemented at the same time.

You have been employed as a personnel administrator at your company for several years. You are responsible for all tasks in the HR department. Until now, you have not been involved to a large extent in the implementation of the system. You want to rectify this in the coming days.

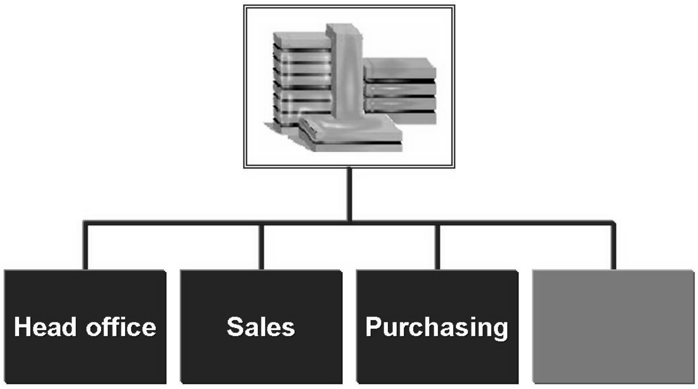


Figure 8: Enterprise Structure of Sales Company

The graphic shows the enterprise structure of your company.

1 **Managing Director**
3 **Sales directors, one per location**
19 **External sales persons (to be hired)**
5 **Internal sales persons**
5 **Purchasers**
10 **Administrative assistants, 5 full-time, 5 part-time (50%)**
1 **Full-time administrator in the Accounting Department**
1 **Full-time administrator in the HR Department**
1 **Part-time administrator in both the Accounts and HR Departments (both 50% part-time)**
4 **System administrators with rotating shifts**
1 **Gardener for tending the grounds**
1 **Janitor**
4 **Security personnel working rotating shifts**

Figure 9: Employee List

The graphic shows the enterprise structure of your company.

Figure 10: SAP Products Implemented

Your company replaced the old system one year ago, implementing the mySAP ERP 2004 system as a replacement. The implementation took place with the support of consultants.

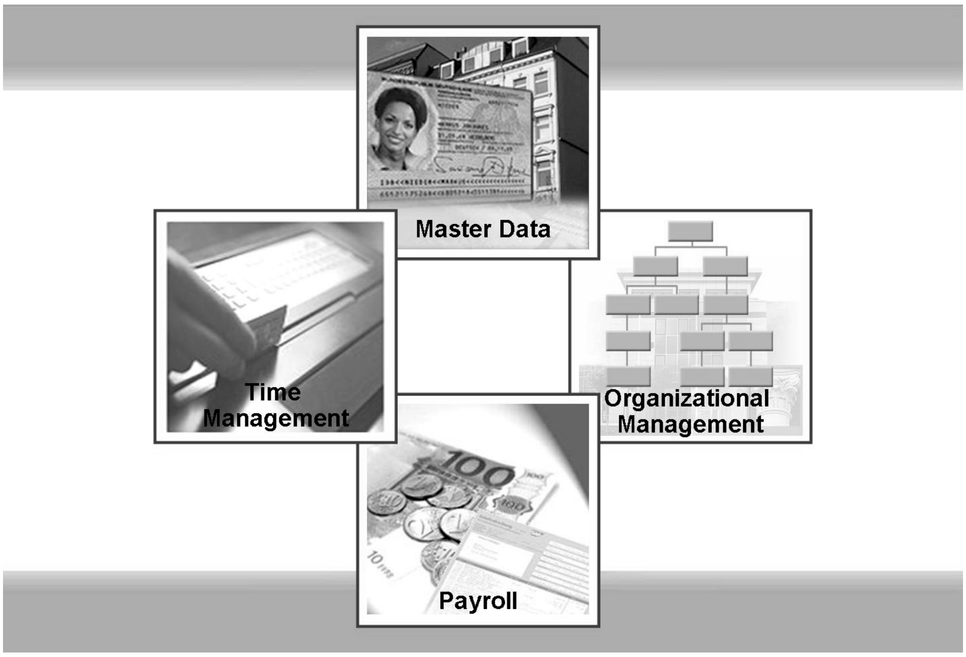


Figure 11: Human Resources Data

In the Human Resources area, your company is using the following components: Master Data, Time Management, Payroll, and Organizational Management.

A New Employee's HR Master Data Sheet

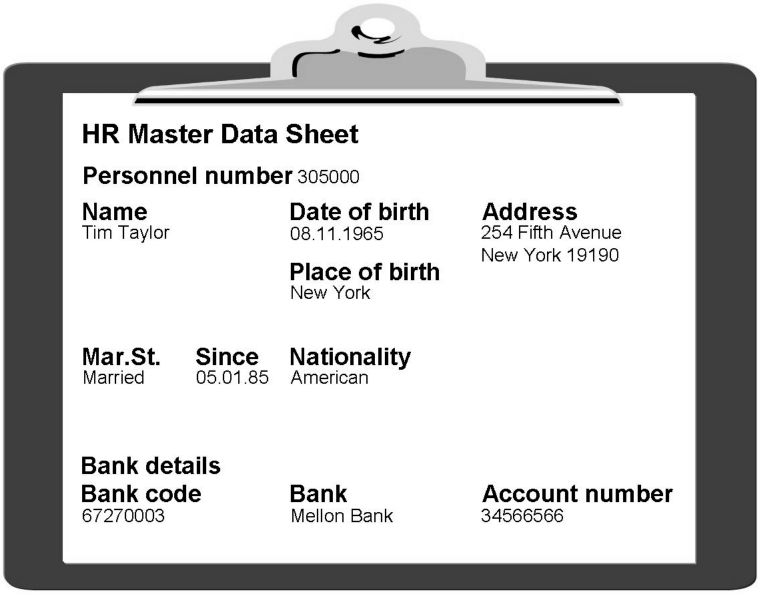


Figure 12: A New Employee's HR Master Data Sheet (1)

If you want to retain a new employee's hire data, you can take the details from the employee's files. You can use a hiring action to transfer this data into the SAP system. The graphic is an example of a HR master data sheet. In addition to the employee's personal data, the HR master data sheet also includes the employee's organizational assignment, workplace and data on the employee's family.

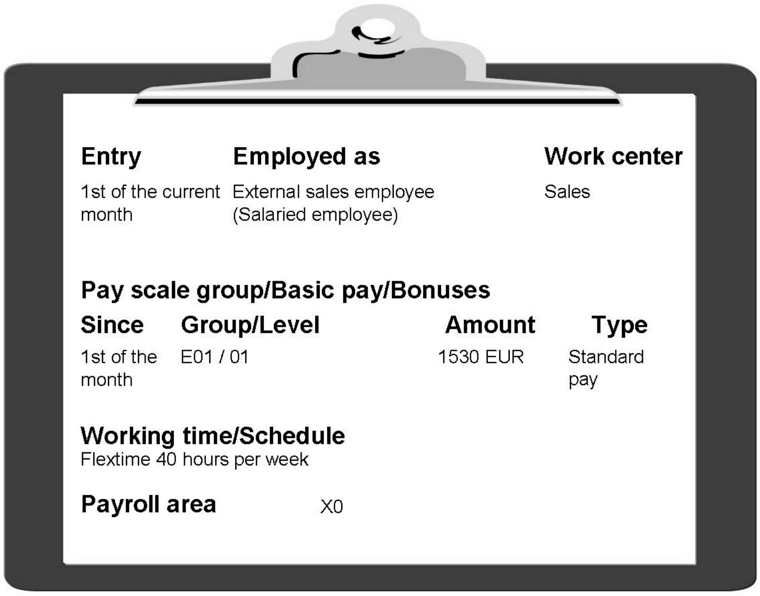


Figure 13: A New Employee's HR Master Data Sheet (2)

Here you can see the employee's working time data and information concerning how and when the employee is paid.

Using a Personnel Action to Hire an Employee

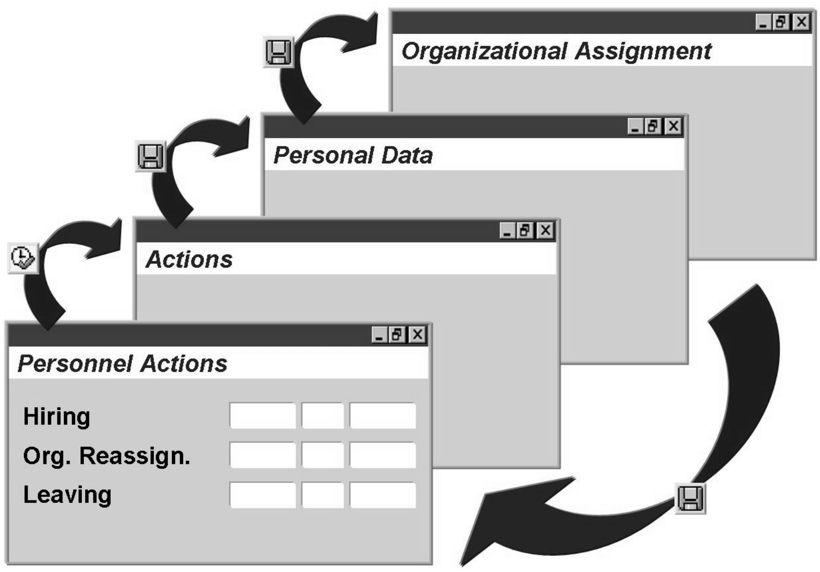


Figure 14: Using a Personnel Action to Hire an Employee

You use a personnel action to transfer the employee's data into the SAP system. To run an action, access the personnel actions through the Personnel Administration menu. Access the Hiring action, and enter the new employee's data. This function automatically takes you through all the infotypes you need to hire an employee. Once you have entered all the relevant data for that particular infotype and saved your entries, the system automatically takes you to the next infotype record. When you complete the hiring action, the system takes you back to the initial personnel action screen.

- **When you are hiring an employee you should create the following entry screens:**

International infotypes

- Actions (Infotype 0000)
- Organizational Assignment (Infotype 0001)
- Personal Data (Infotype 0002)
- Addresses (Infotype 0006)
- Planned Working Time (Infotype 0007)
- Basic Pay (Infotype 0008)
- Bank Details (Infotype 0009)
- ...

Country-specific infotypes

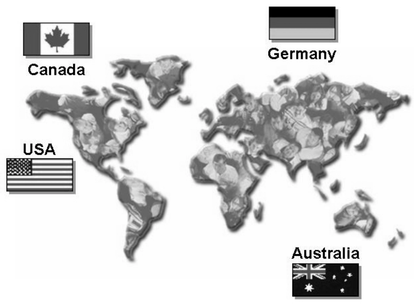


Figure 15: Entry Screens for Hiring

This graphic includes the most important infotypes for a hiring action. On the left are the international entry screens.

In addition to these, there are a number of country-specific infotypes, for example, tax data.

Exercise 2: Hiring an Employee

Exercise Objectives

After completing this exercise, you will be able to:

- Hiring new sales employees at Caliber ‘A’ Bicycle Company

Business Example

The Caliber 'A' Bicycle Company is famous for its quality products. The demand for its products is so great that you have to hire a new sales representative for Sales Department 1.

Task:

Use the *Hiring HR305* personnel action to hire the new sales employee.

1. On the *Personnel Actions* screen, use the personnel number *305991##* (## = your group number) for your new employee, and enter the first of the month as the start date.

   Select the *Hiring HR305* action type, and hire your employee to work in the *personnel area CABB (Caliber A Bicycle Company)*. Assign the new employee to the employee group *Active (1)*, and to the employee subgroup *Salaried employees (X0)*.

2. On the *Create Actions (infotype 0000)* screen, use the structure search to search for the ## Sales Representative position for the employee. You find this under the following path: *Org. Units HR Training Group → Training International → Sales Total → Sales Department 1*.

   The entries for personnel area *(CABB)*, employee group *(active)* and employee subgroup *(salaried employees)* should correspond to the entries you made on the *Personnel Actions* screen. You fill the fields for personal data at a later point.

   Save the data for this infotype.

3. Check the data proposed on the *Create Organizational Assignment (infotype 0001)* screen, select the entry 0001 (Sales) in the subarea, and save the infotypes.

   Hint: *If the system prompts you to do so, delimit the vacancy for the position to the default date.*

4. Enter fictional data for all the required fields on the *Create Personal Data (infotype 0002)* screen and save the data.

Continued on next page

5. Enter fictional data for all the required fields on the *Create Addresses (infotype 0006)* screen and save the data.
6. Enter fictional data for all the required fields on the *Create Bank Details (infotype 0009)* screen and save the data. If you choose *Bank transfer* (B) as the method of payment, you must also enter the bank details. This is not necessary for payment by *Check* (C). Save the data.
7. Select the work schedule rule NORM on the *Create Planned Working Time (infotype 0007)* screen, choose *Enter*, and save the data.
8. Select the pay scale group *E01* and the level *01* on the *Create Basic Pay (infotype 0008)* screen, choose *Enter*, and save the data.

Solution 2: Hiring an Employee

Task:

Use the *Hiring HR305* personnel action to hire the new sales employee.

1. On the *Personnel Actions* screen, use the personnel number *305991##* (## = your group number) for your new employee, and enter the first of the month as the start date.

   Select the *Hiring HR305* action type, and hire your employee to work in the *personnel area CABB (Caliber A Bicycle Company)*. Assign the new employee to the employee group *Active (1)*, and to the employee subgroup *Salaried employees (X0)*.

   a) *PersAdmin → Personnel Management → Administration → HR Master*

   b) Choose *Personnel Actions*.

   c) Select the Hiring HR305 personnel action.

   d) Before you execute the *Hiring HR305* personnel action, make the following entries on the *Personnel Actions* screen:

   e) Personnel number: 305991##

   f) Start date: First of this month

   g) Select the Hiring HR305 personnel action.

   h) Personnel Area CABB

   i) Employee group: 1 (active), Employee subgroup: Salaried employee (X0)

   j) Choose *Execute*.

2. On the *Create Actions (infotype 0000)* screen, use the structure search to search for the ## Sales Representative position for the employee. You find this under the following path: *Org. Units HR Training Group → Training International → Sales Total → Sales Department 1*.

   The entries for personnel area *(CABB)*, employee group *(active)* and employee subgroup *(salaried employees)* should correspond to the entries you made on the *Personnel Actions* screen. You fill the fields for personal data at a later point.

   Save the data for this infotype.

   a) Use the *Structure Search* to find the ## *Sales Executive* position in the *Org. Units HR Training Group* in the *Sales Department 1* organizational unit.

Continued on next page

3. Check the data proposed on the *Create Organizational Assignment (infotype 0001)* screen, select the entry 0001 (Sales) in the subarea, and save the infotypes.

   Hint: *If the system prompts you to do so, delimit the vacancy for the position to the default date.*

   a) Check the data proposed on the *Create Organizational Assignment (infotype 0001)* screen and save the infotypes.

      Hint: *If the system prompts you to do so, delimit the vacancy for the position to the default date.*

4. Enter fictional data for all the required fields on the *Create Personal Data (infotype 0002)* screen and save the data.

   a) Enter fictional data for all the required fields on the *Create Personal Data (infotype 0002)* screen and save the data.

      Hint: *If you enter data on partners or children, a dynamic action may require you to enter additional data in the system. If this is the case, select the corresponding entries and continue with the Hiring action.*

5. Enter fictional data for all the required fields on the *Create Addresses (infotype 0006)* screen and save the data.

   a) Enter fictional data for all the required fields on the *Create Addresses (infotype 0006)* screen and save the data.

6. Enter fictional data for all the required fields on the *Create Bank Details (infotype 0009)* screen and save the data. If you choose *Bank transfer* (B) as the method of payment, you must also enter the bank details. This is not necessary for payment by *Check* (C). Save the data.

   a) Enter fictional data for all the required fields on the *Create Bank Details (infotype 0009)* screen and save the data. If you choose *Bank transfer* (B) as the method of payment, you must also enter the bank details. This is not necessary for payment by *Check* (C). Save the data.

7. Select the work schedule rule NORM on the *Create Planned Working Time (infotype 0007)* screen, choose *Enter*, and save the data.

   a) Work schedule rule NORM

Continued on next page

8. Select the pay scale group *E01* and the level *01* on the *Create Basic Pay (infotype 0008)* screen, choose *Enter*, and save the data.

   a) Pay scale group E01, level 01

   b) Save the data.

Lesson Summary

You should now be able to:

- Discuss the special features of Human Resources in your company and describe the enterprise structure
- Hire a new employee

Unit Summary

You should now be able to:

- Discuss the special features of Human Resources in your company and describe the enterprise structure
- Hire a new employee

Unit 3

Managing and Executing Projects

Unit Overview

This section deals with making system settings using the options provided by SAP. One of the main focuses is creating and using a project IMG.

Unit Objectives

After completing this unit, you will be able to:

- Understand the different forms of the Implementation Guide and its advantages
- Create a new Project IMG
- Carry out evaluations in the IMG
- Maintain IMG entries
- Explain effects of changes in the IMG table on the application

Unit Contents

Lesson: General and Project Management

Lesson Overview

Options are displayed in this lesson using the IMG system settings.

Lesson Objectives

After completing this lesson, you will be able to:

- Understand the different forms of the Implementation Guide and its advantages
- Create a new Project IMG

Business Example

Your company has bought a manufacturing company.

You must now map the new company structure and all the changes for the Human Resources area in the system.

SAP provides the tool that will help you map the new company requirements when working through the project steps: a project IMG.

The New Situation in Your Company

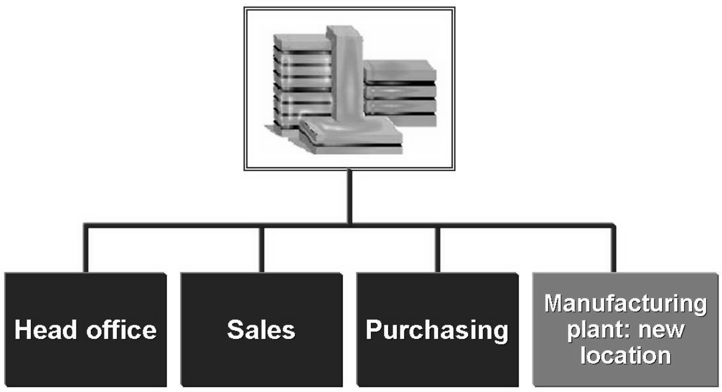


Figure 16: The New Structure in Your Company

In the last few years, your company has effectively managed its resources. The management has decided to branch into manufacturing bikes, in addition to just selling them. The company has therefore bought a manufacturing plant in a new location.

The company must now implement the SAP system at the manufacturing plant. To do this, you must customize the existing system.

1 Managing Director
3 Sales directors, one per location
19 External sales persons
5 Internal sales persons
5 Purchasers
10 Administrative assistants, 5 full-time, 5 part-time (50%)
1 Full-time administrator in the Accounting Department
1 Full-time administrator in the HR Department
1 Part-time administrator in both the Accounts and HR Departments (both 50% part-time)
4 System administrators with rotating shifts
1 Gardener for tending the grounds
1 Janitor
4 Security personnel working rotating shifts

Workers at the new production plant

1 Managing Director
1 Production manager
1 Warehouse manager
5 Warehouse workers (hourly wage)
5 Fitters/packers
19 Production workers (hourly wage)
1 Controller for work scheduling
1 Work scheduler
5 Lathe operators (hourly wage)
5 Welders (hourly wage)
5 Locksmiths (hourly wage)

Figure 17: New Employee List

The graphic lists your company's employees.

There are several employees employed at the manufacturing plant that you must add to the SAP system.

You must make a number of changes to the existing system.

Project Steps Needed to Map the New Enterprise Structure in the SAP System

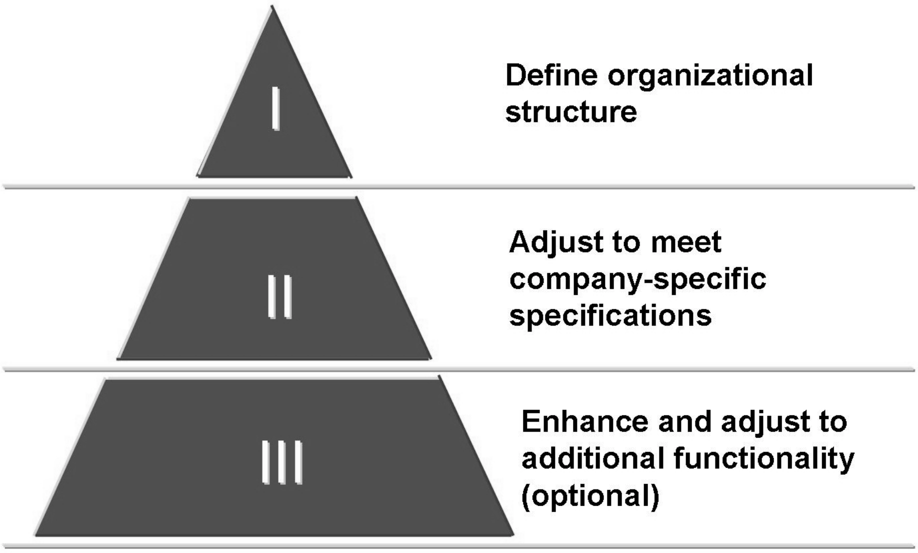


Figure 18: Project Steps Needed to Map the New Enterprise Structure in the SAP System

The SAP project team will make the changes to the SAP system to meet the requirements of the new manufacturing plan. You are a member of the project team customizing the system to meet the Human Resources requirements.

Together with the project team members from other applications, you must first define the new enterprise structure. Then you must make these changes in the system so that it meets the manufacturing plant's Human Resources requirements. This system configuration is known as **Customizing**. The members of the project team make settings in the system to adjust the system to meet the company's requirements of a productive system.

You may also have to to implement additional functions using program modifications.

SAP Tools – The Implementation Guide (IMG)

Figure 19: Tool - The Implementation Guide

To make sure that you carry out all the project steps required, SAP provides you with a tool - the Implementation Guide - to help you with the implementation and customizing.

You can use the Implementation Guide to store your customer-specific requirements in the system (Customizing).

Customizing is a method that supports the following situations:

- Implementing the mySAP ERP 2005 system
- Enhancing the mySAP ERP 2005 system
- With a Release Upgrade

The Difference Between Managing and Executing Projects

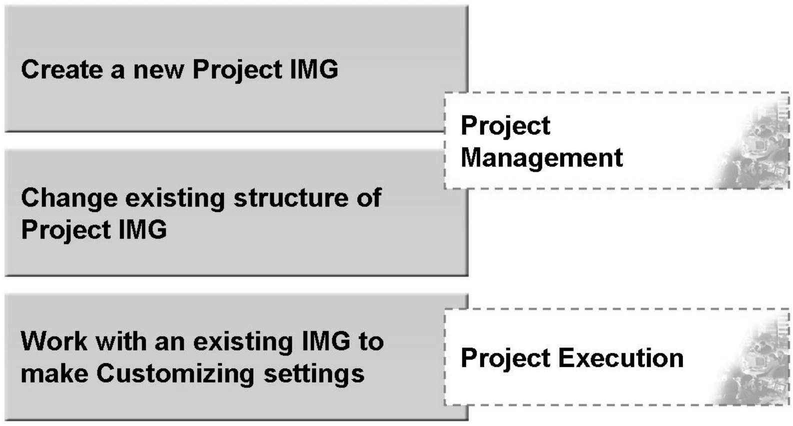


Figure 20: The Difference Between Managing and Executing Projects

You create new projects in project management. Here, you also change the structure of existing Project IMGs (scope, planning data of project, and so on).

If you want to use an existing Project IMG or the SAP Reference IMG to make Customizing settings, you use project execution.

IMG Forms

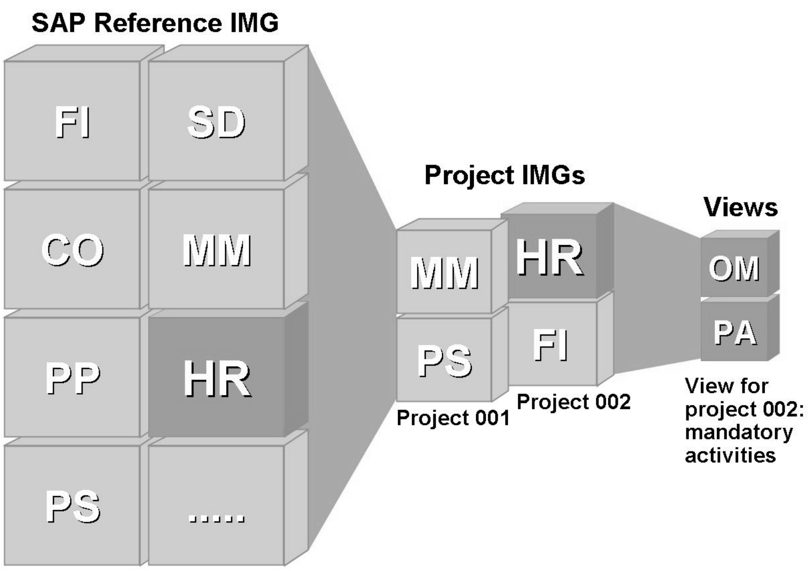


Figure 21: IMG Forms

In your delivery system, you will find an **SAP Reference IMG**. This IMG contains all the customizing settings for all mySAP ERP 2005 components for all countries.

You create the **Project IMG** by selecting countries and application components based on the SAP Reference IMG. You can use the project IMG to process Customizing steps, project documentation, and project information.

To make the project IMG even easier to use, you can create **project views**. You can also use project views to process Customizing steps, project documentation, and project information. You can use the attributes mandatory/optional/critical/non-critical as a basis for the views, or you can define your own views. By using views you can reduce the number of Customizing steps.

Exercise 3: General and Project Management (Optional)

Exercise Objectives

After completing this exercise, you will be able to:

- Create a Project IMG

Business Example

Your company has recently purchased several manufacturing plants. These new plants will have an effect on Human Resources, and must be mapped in the system. Your task is to create a tool to enter and document system settings. This tool is the Project IMG.

Task:

Enter Project Managment to create a project IMG. Give your project IMG the project name HR305_GR## (## = your group number).

1. Create a name (description) for your project. Include your group number in the description.
2. Enter your name as the project manager (under Person Responsible).
3. Enter today's date as the start date and the date in four weeks time as the end date of the project.
4. On the tab pages, you must assign the following data:

   Assign project members:

   Enter your user ID, select six other users from the course, and enter them into the list.

   Assign status values: *In process, completed, quality check done, review planned, and not relevant.*

   Assign key words: HR - Human Resources
5. On the *Documentation Types* tab page, choose documentation type *Y1 Logs, Decisions*.
6. On the *Cross-Ref.* tab page, switch off the where-used list.
7. On the *Project Views* tab page, enter details on a view for your project IMG, which should contain both critical and non-critical mandatory activities. Choose Save, without generating the view.

Continued on next page

8. On the *Scope* tab page, choose *Specify project scope by choosing application components and countries.*

   Select the country according to the country in which the course is being held.

   Select the following HCM components in the application components:

   - In the Personnel Management node:
     - *Personnel Administration (for your country)*
     - *Personnel Administration for General Parts*
   - The complete Organizational Structure node
   - In the Time Management node:
     - *Work schedule*
     - *Time Data Recording and Administration*
   - In the Payroll node:
     - *Payroll for your country*

9. Save your data, and choose *Generate Project IMG*.

   Do not generate the IMG in the background, and confirm that you wish to generate the view.

Solution 3: General and Project Management (Optional)

Task:

Enter Project Managment to create a project IMG. Give your project IMG the project name HR305_GR## (## = your group number).

1. Create a name (description) for your project. Include your group number in the description.
   a) *Tools* → *Customizing* → *IMG*. Select the *Project management* button.
   b) Choose *Create Project*, and enter HR305_GR## as the project name.
2. Enter your name as the project manager (under Person Responsible).
   a) ...
3. Enter today's date as the start date and the date in four weeks time as the end date of the project.
   a) ...
4. On the tab pages, you must assign the following data:

   Assign project members:

   Enter your user ID, select six other users from the course, and enter them into the list.

   Assign status values: *In process, completed, quality check done, review planned, and not relevant.*

   Assign key words: HR - Human Resources
   a) Enter your user *HR305-##*.
   b) Assign other project members.
   c) Assign status values: 01 – *In process*, 02 – *completed*, 03 – *quality check done*, 04 – *review planned*, 05 – *not relevant.*
   d) Assign key words: HR - Human Resources
5. On the *Documentation Types* tab page, choose documentation type *Y1 Logs, Decisions*.
   a) ...
6. On the *Cross-Ref.* tab page, switch off the where-used list.
   a) Select *Switch off where-used list*.

Continued on next page

7. On the *Project Views* tab page, enter details on a view for your project IMG, which should contain both critical and non-critical mandatory activities. Choose Save, without generating the view.

   a) Choose the *Project Views* tab page. Now choose *Create project view.* Enter a name for your view, and choose *Activity necessity*. Choose *Continue*.

   b) Under *Activity necessity*, select critical and non-critical mandatory activities, and then choose *Save*, but do not *generate* the view at this point.

8. On the *Scope* tab page, choose *Specify project scope by choosing application components and countries.*

   Select the country according to the country in which the course is being held.

   Select the following HCM components in the application components:

   - In the Personnel Management node:
     - *Personnel Administration (for your country)*
     - *Personnel Administration for General Parts*
   - The complete Organizational Structure node
   - In the Time Management node:
     - *Work schedule*
     - *Time Data Recording and Administration*
   - In the Payroll node:
     - *Payroll for your country*

   a) Choose *Select countries to include in project scope*, and select your country.

   b) Choose *Change selection* and under Personnel Management, select the following components: *Personnel Administration (for your country)*, and *Organizational Structure*. Under Time Management, select the components *Work schedule* and *Time Data Recording and Administration*, and under Payroll, select *Payroll for your country*.

9. Save your data, and choose *Generate Project IMG*.

   Do not generate the IMG in the background, and confirm that you wish to generate the view.

   a) Choose Save, and then Generate Project IMG. In the subsequent dialog box, deselect the Generate in background indicator, but leave the Generate project views indicator selected. Choose Continue, and wait until your project IMG has been generated.

Lesson Summary

You should now be able to:

- Understand the different forms of the Implementation Guide and its advantages
- Create a new Project IMG

Lesson: Project Execution and Evaluation

Lesson Overview

IMG attributes and evaluations

Maintaining IMG tables and effects on application

Lesson Objectives

After completing this lesson, you will be able to:

- Carry out evaluations in the IMG
- Maintain IMG entries
- Explain effects of changes in the IMG table on the application

Business Example

You should perform different evaluations in your company using individual call ups in the IMG.

You should become acquainted with table maintenance in the IMG and understand the effects in the application.

IMG: Functions

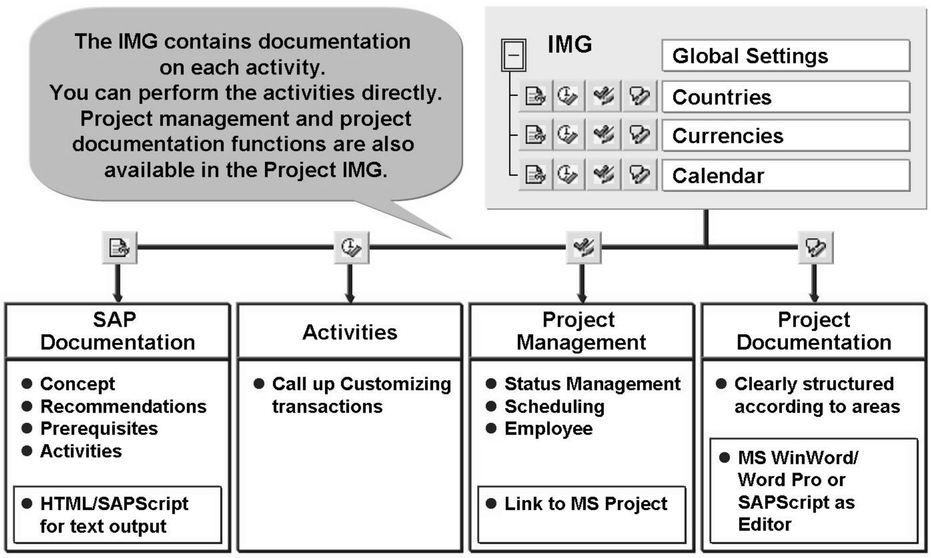


Figure 22: IMG: Functions

The Implementation Guide enables you to set up the system. You can use the Implementation Guide to implement all mySAP ERP 2005 application components.

SAP has divided the Implementation Guide into application areas. The Implementation Guide lists the activities in the order that you are to execute them within these application areas.

SAP created the Implementation Guide using a hierarchical structure. On the lowest level, you can perform the following functions using icons:

- **Calling Up SAP Documentation**

  You can find the information you need to help you customize the system settings.

- **Calling up the Customizing transaction**

  using a selection of icons for the system settings

- **Calling Up Project Management (only in project IMG)**

  You can call up project management for every customizing step. You can enter the status, tasks, degree of processing, and resources.

- **Calling Up Project Documentation (only in project IMG)**

  You can enter your project documentation for each customizing step. You can store your documentation either as project-specific or project-independent documentation.

Evaluations in IMG

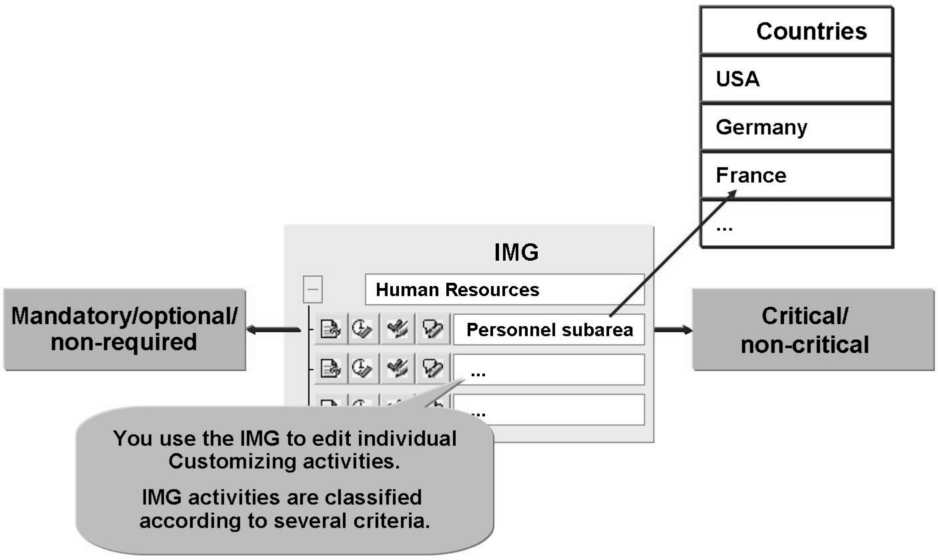


Figure 23: IMG: Attributes

SAP gives each customizing step specific attributes. Attributes are grouped as follows:

- Mandatory Activities

  These are activities for which SAP cannot deliver complete default settings (for example, enterprise structure). You must store your customer-specific requirements for activities classified as mandatory.

- Optional Activities

  SAP delivers default settings for these activities. You can use these settings if they meet your requirements.

- Non-Required Activities

  SAP delivers complete default settings for these activities. Only in exceptional cases do you need to adapt these settings (for example, if you need country-specific settings).

In addition, Customizing steps have the following attributes:

- Critical Activities

  You must proceed with great care when performing critical activities as any errors made here can have far-reaching consequences.

- Non-Critical Activities

  You must also proceed with care when you carry out these activities, but the consequences of any errors are less far-reaching.

You can also determine for each Customizing step the countries for which the activity is necessary.

Links Between Master Data and Customizing Tables

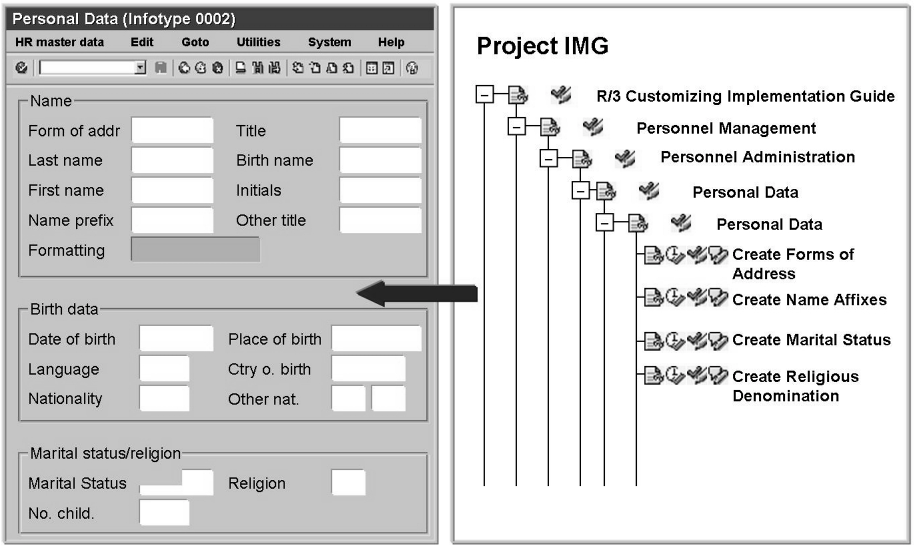


Figure 24: Links Between Master Data and Customizing Tables

You store employee data in infotypes. All the entries that require specific texts come from tables that you can set up when you customize the system. The possible entries (F4) are a section of the IMG and enable you to see what data the system stores in the corresponding table.

You need to enter data in the Customizing tables to be able to use your company's data (for example, enterprise structure or new pay scale groups) in master data.

Maintenance in Customizing Tables

Customizing Tables: Key and Function Fields

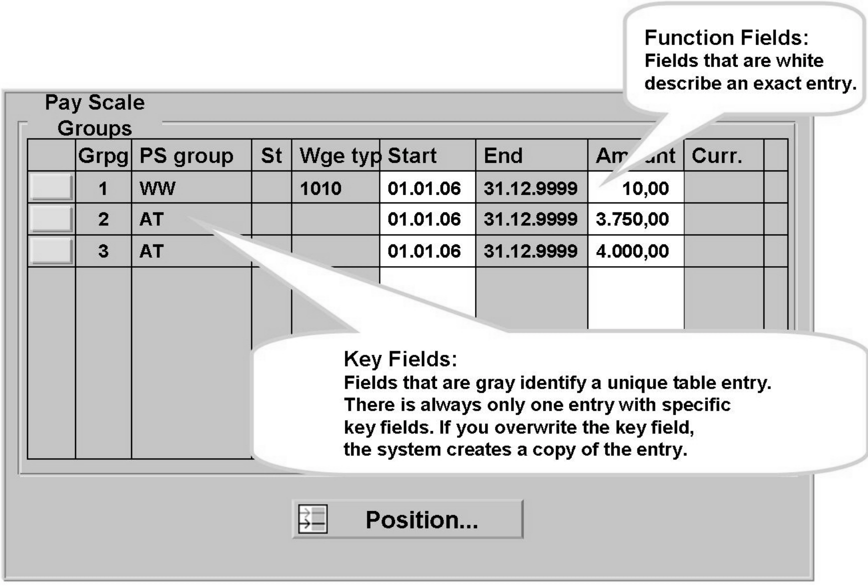


Figure 25: Customizing Tables: Key and Function Fields

An entry in a Customizing table is made up of key fields and function fields.

Key fields identify a specific unique entry, whereas function fields describe this entry.

There is always only one table entry with the same key fields.

Customizing Tables: Create - Copy

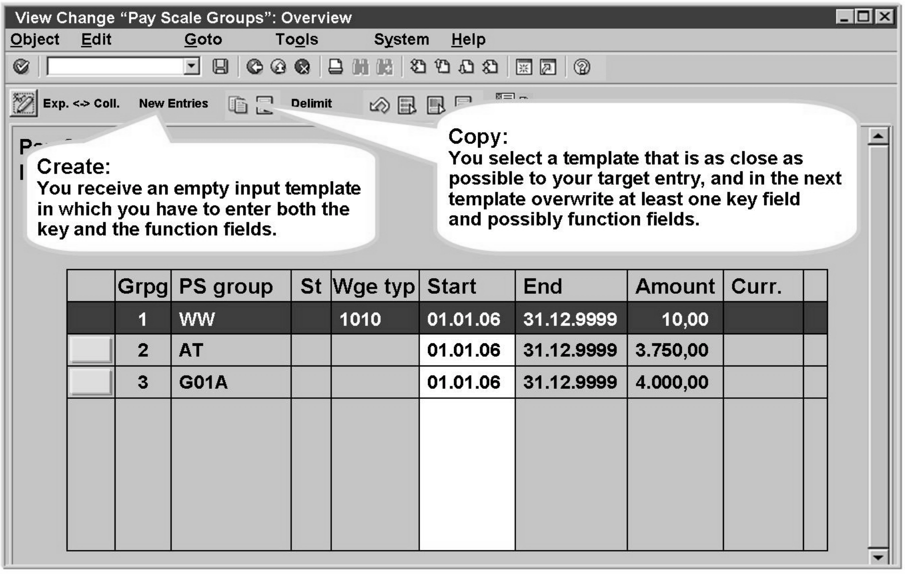


Figure 26: Customizing Tables: Create - Copy

You can use two methods to make entries in Customizing tables:

- New entries:

  You receive an empty input template in which you have to enter both the key and the function fields.

- Copy:

  Select an entry that you want to copy and overwrite the entries in the key and, if necessary, the function fields on the subsequent screen.

Customizing Tables: Deleting Entries

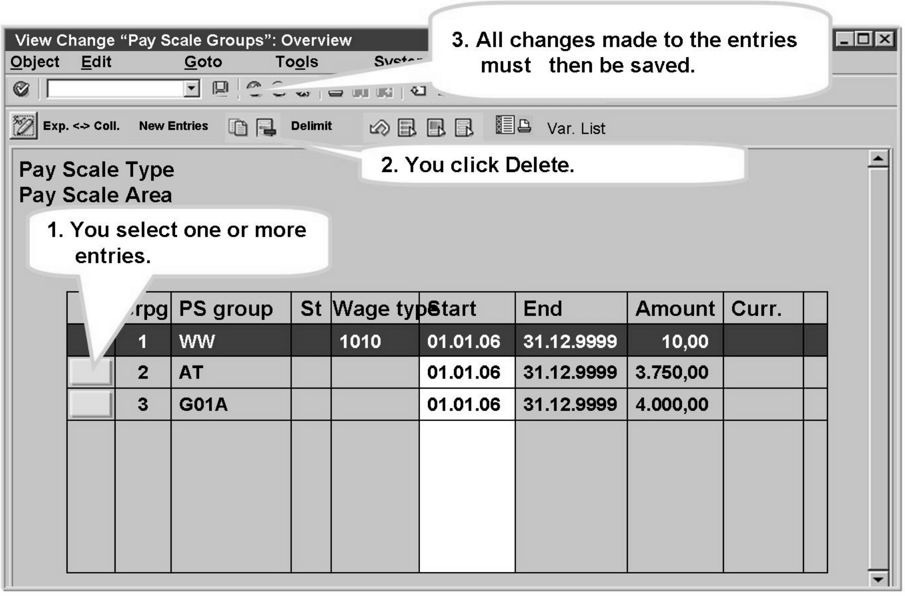


Figure 27: Customizing Tables: Delete - Save

To delete entries in Customizing tables, select the entries that you want to delete and then choose Delete.

You must save all the changes you make to Customizing tables.

Customizing Tables: Delimit

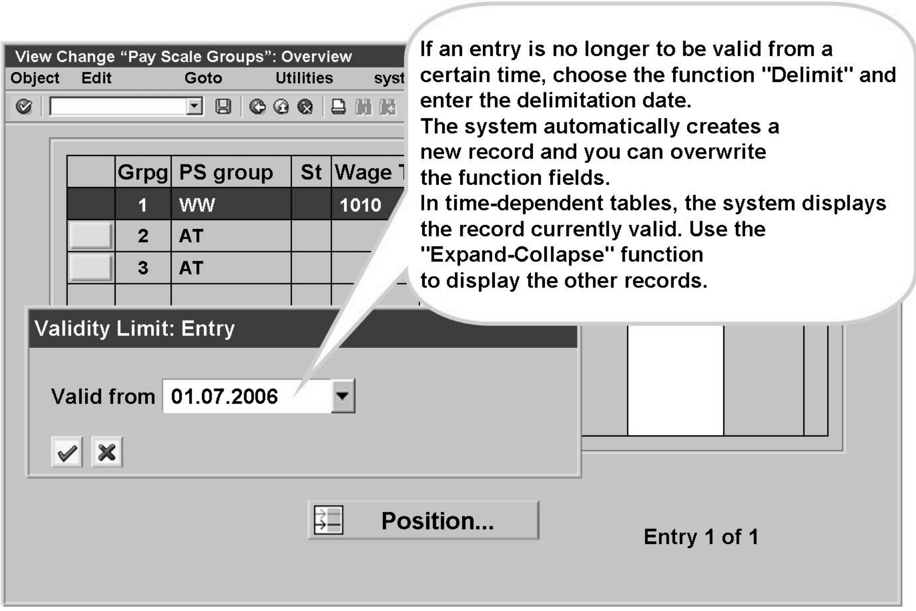


Figure 28: Customizing Tables: Delimit

If an entry is no longer valid as of a certain date, choose “Delimit” and enter the delimitation date. The system automatically creates a new record and you can overwrite the function fields. The old table entry is kept for the history.

In time-dependent tables, the system displays the record currently valid. Use the “Expand-Collapse” function to display the other records.

Customizing Settings from the Application

Customizing Settings from the Application (1)

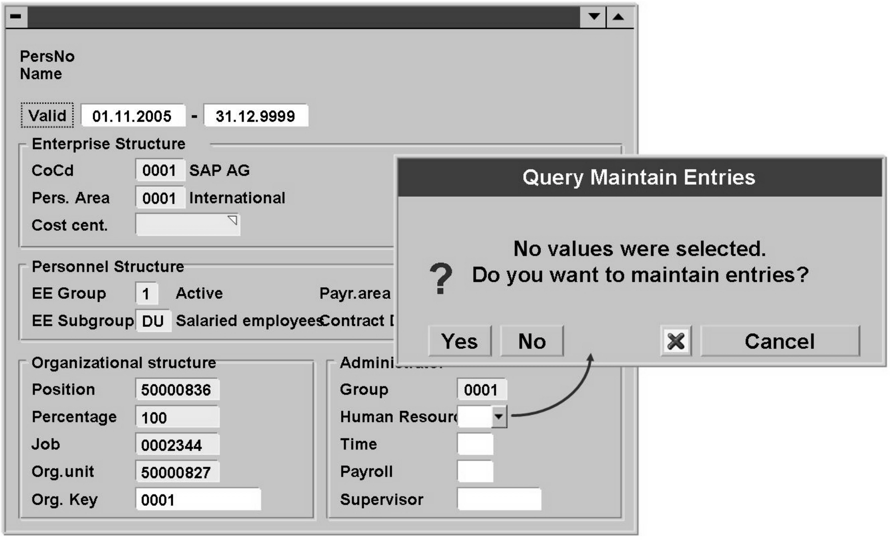


Figure 29: Customizing Settings from the Application (1)

If there are no entries for a field in master data, the appropriate dialog box appears. You can then go directly to the relevant IMG step from this dialog box. You can then maintain the necessary entries.

This functionality is not active in the production system.

Customizing Settings from the Application (2)

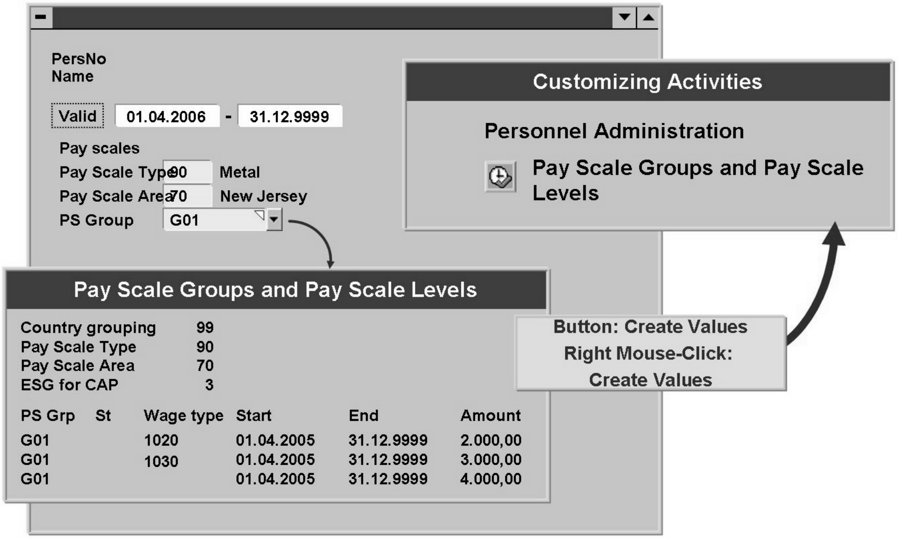


Figure 30: Customizing Settings from the Application (2)

By choosing the *Create Values* function, or by choosing *Create Values* from the right mouse-click menu, you can jump from master data to the correct position in the IMG, and maintain the entries accordingly. You can also specify whether you require Customizing activities from a specific Project IMG, or from the SAP Reference IMG.

This functionality is not active in the production system.

Exercise 4: Project Execution and Evaluation

Exercise Objectives

After completing this exercise, you will be able to:

- Working with a Project IMG

Business Example

Your company has recently purchased several manufacturing plants. These new plants will have an effect on Human Capital Management, and must be mapped in the system. Use a project IMG to create system settings. You now wish to familiarize yourself with the implementation of a project IMG.

Task 1:

1. Enter the Execute Project mode.

   First, you must enter the Project IMG **HR305** in your worklist for you to be able to work with it. Define this project IMG as a standard project.

Task 2:

1. In the user-specific settings, adjust the display of the project IMG to meet your own requirements (we recommend not using a split screen).

Task 3:

Enter your own project IMG, and expand some nodes. Now answer the following questions:

1. On each of the lowest levels, you will find the individual IMG steps with four different icons. Now answer the following questions:

   Which icon displays information on what this IMG step does?

   ____

   Where can you record information on the status of a step, the level of processing, and planned start and end times?

   ____

Continued on next page

For a particular step, you want to log who did what, where, and why. Where can you record this information?

____

You now want to edit a table entry. Which icon enables you to edit table entries?

____

2. Use the *Find...* function to search for the *Create Marial Status* IMG step. Alternatively, use the menu option *Edit - Find*. What is the name of the table that you need to edit for this IMG step?
3. Assign the status *Completed* to any activity, and display this status in the structure of the project IMG.
4. In the IMG, display all of the different categories for the importance of the activities. Name these categories.

   ____

   ____

   ____

5. Check the critical activities in the IMG. What are the two categories called?

   ____

   ____

6. Make the system display all IMG activities that have the status *completed*.

Task 4:

Creating Entries in Customizing Tables

1. In Execute Project, navigate to the *Personal Data* node.

   From there, call the IMG activity *Create name affixes*.

   Create the following two entries, once by choosing *New Entries* and once by choosing *Copy*:

Affix type (AT):	T (academic title before name, such as Dr.)
Name Affix:	A## and B##
Output text:	## + a text of your choice

   What is the essential difference between the copy function and the create new entries function?

   ____

Continued on next page

____

Save your entries.

2. Go into the Maintain HR Master Data transaction for the employee you hired (personnel number 305991##) and call the *Personal Data* infotype in change mode.

   In the *Title* field, open the selection list using the F4 help. Among others, you can see the entry you just created.

   Exit the infotype without saving it.

Task 5:

Deleting Entries

1. Go back into Execute Project, and navigate to the *Personal Data* node. From there, call the IMG activity *Create name affixes* again.

   What steps do you have to perform to delete both your entries again?

   ____

   ____

   ____

   Delete both your entries. Do not change the other entries.

2. Call the Personal Data infotype in change mode again for your employee (personnel number 305991##) and open the value help for the Title field.

   The two entries you deleted are no longer displayed.

Task 6:

The following exercises are optional.

Delimiting Entries

1. In the IMG, navigate to the *Basic Pay* node and start the IMG activity *Revise Pay Scale Groups and Levels*. This calls the pay scale table T510.

   Enter the following values in the dialog box that appears:

Country grouping:	99
PS type:	90
Pay scale area:	50

   Now create another entry with the following values:

Continued on next page

Grouping:	2
Pay scale group:	GR##
Pay scale level:	01
Wage type:	
Start date:	01.01.2002
End date:	31.12.9999
Amount:	any
Currency:	EUR

2. During collective agreement negotiations, a decision was made to increase the value of the entry you have just created by 5%. Why can you not simply overwrite the old value using the change function?

   ____

   ____

   Delimit the relevant entry.

   Display the history.

Solution 4: Project Execution and Evaluation

Task 1:

1. Enter the Execute Project mode.

   First, you must enter the Project IMG **HR305** in your worklist for you to be able to work with it. Define this project IMG as a standard project.

   a) *SAP EASY ACCESS MENU:Tools → Customizing → IMG → Execute Project*

   b) Choose *Add to worklist*. Select the HR305 project IMG and choose *Copy*.

   c) Select the HR305 project IMG and in the *Edit* menu, choose *Default project or view → Define.*

Task 2:

1. In the user-specific settings, adjust the display of the project IMG to meet your own requirements (we recommend not using a split screen).

   a) In the *Settings → User-specific* menu, make sure that the *Split screen* indicator is not set in the *General* tab page. Choose *Continue*.

Task 3:

Enter your own project IMG, and expand some nodes. Now answer the following questions:

1. On each of the lowest levels, you will find the individual IMG steps with four different icons. Now answer the following questions:

   Which icon displays information on what this IMG step does?

   ____

   Where can you record information on the status of a step, the level of processing, and planned start and end times?

   ____

   For a particular step, you want to log who did what, where, and why. Where can you record this information?

   ____

Continued on next page

You now want to edit a table entry. Which icon enables you to edit table entries?

____

a) In your Customizing worklist, select your HR305 project, and choose *Display project* in the bottom left of the screen.

b) First icon: *If you choose this icon, you branch into the SAP documentation for this activity*.

c) *If you double-click the name of a step, you also branch into the SAP documentation.*

d) Third icon: *If you choose this icon, you branch into status maintenance*

e) Fourth icon: *If you choose this icon, you branch into note maintenance or the status information*

f) Second icon: *Node has an executable function. If you choose this icon, you run the IMG activity.*

2. Use the *Find...* function to search for the *Create Marial Status* IMG step. Alternatively, use the menu option *Edit - Find*. What is the name of the table that you need to edit for this IMG step?

   a) Choose *Find...*, or use the menu option *Edit - Find*. Enter the name of the Customizing activity, and choose *Continue*. If more than one activity exists, the system displays a hitlist. If only one activity is found, the system jumps directly to the activity in the list.

   b) Choose the executable function. In other words, choose the second icon alongside the *Define Countries* activity.

   c) Position the cursor on a table entry.

   d) Choose *Help* (or F1).

   e) When the Performance Assistant appears, choose *Technical information*.

   f) In the Field data screen section, you will find the name of the table, or the views for table *V_T502T* under Generated views.

Continued on next page

3. Assign the status *Completed* to any activity, and display this status in the structure of the project IMG.

   a) To edit the status, choose the icon for status maintenance, and assign status *03 - Completed* to the selected activity.

   b) *Save* your entries, and choose *Back*. You return to the project IMG.

   c) To display the status in the structure of the project IMG, choose

   d) *View → Additional information → Status*

4. In the IMG, display all of the different categories for the importance of the activities. Name these categories.

   ____

   ____

   ____

   a) *Additional information Activity importance*

   Categories: *Optional activity*

   Mandatory activity

   Non-required activity

5. Check the critical activities in the IMG. What are the two categories called?

   ____

   ____

   a) *Additional information → Critical activity*

   Categories: *Critical*

   Non-critical

6. Make the system display all IMG activities that have the status *completed*.

   a) *SAP Easy Access menu:Tools → Customizing → IMG → Project Analysis*

   b) Select Completed in the Status field

   c) Choose Execute

Continued on next page

Task 4:

Creating Entries in Customizing Tables

1. In Execute Project, navigate to the *Personal Data* node.

   From there, call the IMG activity *Create name affixes*.

   Create the following two entries, once by choosing *New Entries* and once by choosing *Copy*:

Affix type (AT):	T (academic title before name, such as Dr.)
Name Affix:	A## and B##
Output text:	## + a text of your choice

   What is the essential difference between the copy function and the create new entries function?

   ____

   ____

   Save your entries.

   a) *SAP Easy Access menu:Tools → Customizing → IMG → Project Analysis*

   b) *In the IMG: Personnel Management → Personnel Administration → Personal Data → Personal Data → Create Marital Status*

   c) *Create: You have to enter all new entries*

   d) *Copy: You only need to change the entries in the copy template that are suitable*

2. Go into the Maintain HR Master Data transaction for the employee you hired (personnel number 305991##) and call the *Personal Data* infotype in change mode.

   In the *Title* field, open the selection list using the F4 help. Among others, you can see the entry you just created.

   Exit the infotype without saving it.

   a) *SAP Easy Access menu:Human Resources → Personnel Management → Administration → HR Master Data → Maintain*

   b) *Personnel number:* 305991##

   c) Select the *Personal Data* infotype and choose *Change*.

   d) Choose *Back* and *confirm the dialog box with Yes*.

Continued on next page

Task 5:

Deleting Entries

1. Go back into Execute Project, and navigate to the *Personal Data* node. From there, call the IMG activity *Create name affixes* again.

   What steps do you have to perform to delete both your entries again?

   ____

   ____

   ____

   Delete both your entries. Do not change the other entries.

   a) *Select entries*

   b) *Choose Delete*

   c) *Choose Save*

2. Call the Personal Data infotype in change mode again for your employee (personnel number 305991##) and open the value help for the Title field.

   The two entries you deleted are no longer displayed.

   a) *SAP Easy Access menu:Human Resources → Personnel Management → Administration → HR Master Data → Maintain*

   b) *Personnel number:* 305991##

   c) Select the *Personal Data* infotype and choose *Change*.

Task 6:

The following exercises are optional.

Delimiting Entries

1. In the IMG, navigate to the *Basic Pay* node and start the IMG activity *Revise Pay Scale Groups and Levels*. This calls the pay scale table T510.

   Enter the following values in the dialog box that appears:

Country grouping:	99
PS type:	90
Pay scale area:	50

   Now create another entry with the following values:

Continued on next page

Grouping:	2
Pay scale group:	GR##
Pay scale level:	01
Wage type:	
Start date:	01.01.2002
End date:	31.12.9999
Amount:	any
Currency:	EUR

a) *IMG: Personnel Management → Personnal Administration → Payroll Data → Basic Pay → Revise Pay Scale Groups and Levels*

b) *Choose New Entries or Copy As and then Copy.*

2. During collective agreement negotiations, a decision was made to increase the value of the entry you have just created by 5%. Why can you not simply overwrite the old value using the change function?

   ____

   ____

   Delimit the relevant entry.

   Display the history.

   a) *If you overwrite the old value, you also overwrite the history.*

   b) *Historical data can be important, for example, for retroactive accounting.*

   c) Select the entry and choose Delimit

   d) Use today's date

   e) Enter new amount

   f) Choose Enter, Save and then Back

   g) *Select entry and choose Expand <-> Collapse.*

Lesson Summary

You should now be able to:

- Carry out evaluations in the IMG
- Maintain IMG entries
- Explain effects of changes in the IMG table on the application

Unit Summary

You should now be able to:

- Understand the different forms of the Implementation Guide and its advantages
- Create a new Project IMG
- Carry out evaluations in the IMG
- Maintain IMG entries
- Explain effects of changes in the IMG table on the application

Unit 4

Enterprise Structure

Unit Overview

The company and personnel structure is modified in this section. The entity copier is thereby illustrated.

Unit Objectives

After completing this unit, you will be able to:

- Describe the meaning and elements of the enterprise structure
- Modify the enterprise structure using the entity copier
- Describe the meaning and elements of the personnel structure
- Understand the modification of the personnel structure using the entity copier
- Check the assignments

Unit Contents

Lesson: Enterprise Structure

Lesson Overview

The elements of Enterprise Structure are described in this lesson.

The Enterprise Structure is modified using the entity copier.

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the meaning and elements of the enterprise structure
- Modify the enterprise structure using the entity copier

Business Example

Since a new manufacturing plant was bought, it is necessary to map the new enterprise structure in the SAP system.

Overview - Enterprise Structure

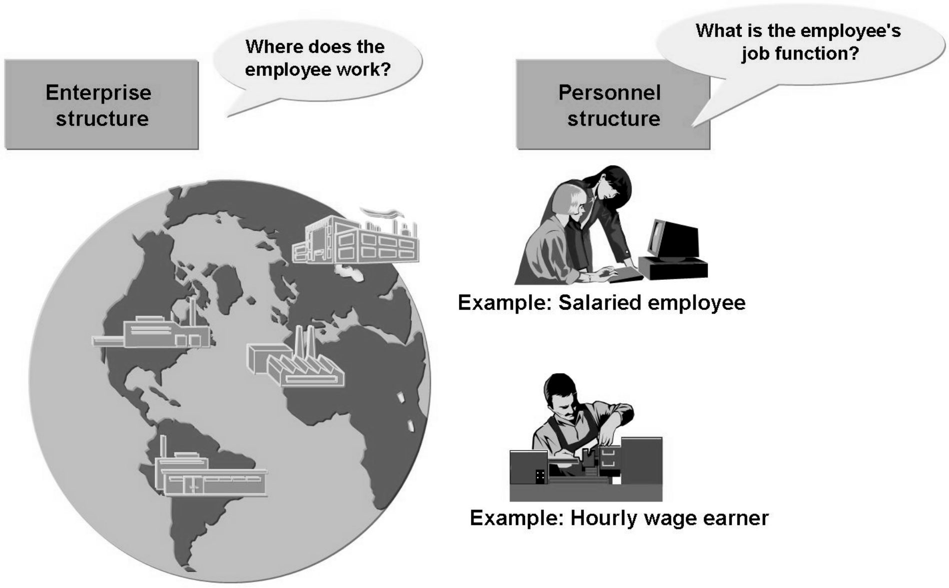


Figure 31: Overview - Enterprise Structure

Every employee has an organizational assignment, that is, he or she is unique in the enterprise structure and in the personnel structure. In other words, the employee belongs to a specific place of work and has a specific status (for example, salaried employee or industrial worker).

You assign an employee to the enterprise structure in master data by means of the “Organizational Assignment” infotype (0001).

In the SAP system, the company's structure consists of the enterprise structure and the personnel structure.

You set up the enterprise and personnel structure using the Customizing functions.

Depicting Company Structure in the SAP System

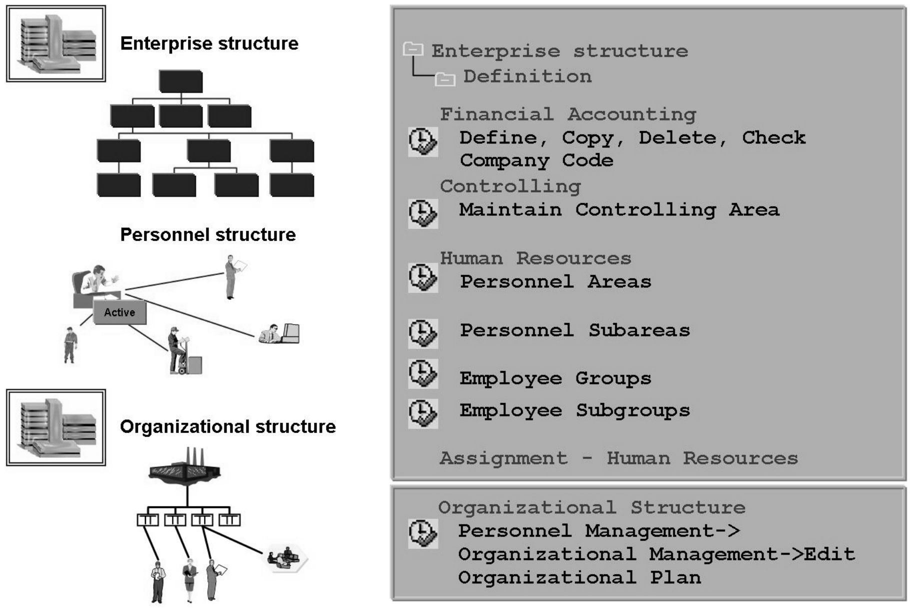


Figure 32: Depicting Company Structure in the SAP System

As the structure of your company has changed, you need to modify the structure currently in the system. You must depict the purchase of the production plant in the enterprise structure.

In addition to these changes, the manufacturing plant contains employees that do not exist in the company, for example, hourly-paid employees.

You must add the organizational units, jobs and positions to the organizational structure.

An overview of the necessary Customizing steps appears on the right.

Parts of the Enterprise Structure

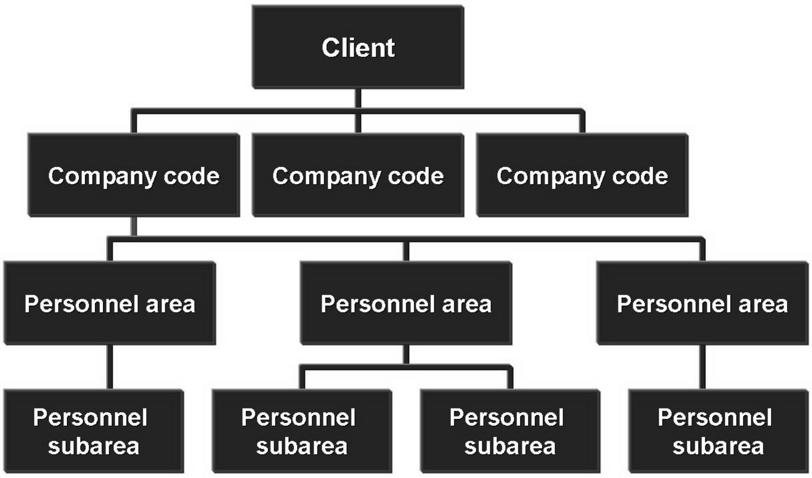


Figure 33: Overview: Enterprise Structure

The following elements define the SAP enterprise structure for Personnel Administration:

- Client
- Company code
- Personnel area
- Personnel subarea

A **client** can either be valid for a company code at the smallest level, or the entire corporate group. The **company code** is defined in financial accounting. The balance sheet and profit and loss statements are drawn up at the company code level. The **personnel area**, which is only used in Personnel Administration, is unique in each client. You must assign each personnel area to a company code. You also use the **personnel subarea** only in Personnel Administration and it is the smallest element of the enterprise structure. You link the groupings that define the entries to be used for employees of a particular company code/personnel area to the personnel subarea.

The client is an independent legal and organizational unit of the system (for example, group).
A three-character alphanumeric code uniquely identifies the different clients within a system.

- **No data exchange between clients (only in exceptional cases)**
- **No access to employee data in other clients**
- **No cross-client evaluations or access authorizations**
- **An employee who changes from one client to another must be assigned a new personnel number**

Figure 34: Enterprise Structure - Client

Client 000 contains the original SAP system, and you cannot change it. Client 001 is also delivered to customers. Both systems are identical when they are delivered.

The system contains both client-independent and client-specific elements.

Elements that SAP describes as client-independent are used in all clients. However, client- specific elements are only used in certain special clients.

The following are defined as client-independent:

- Data structures such as field definitions, table structures and file structures, client-independent tables, transactions, programs, standard evaluations, authorization objects, help documentation, and user-defined programs.

The following are defined as client-specific:

- Client-specific tables (you must copy these from the original client), HR master records, user master records, and authorization profiles.

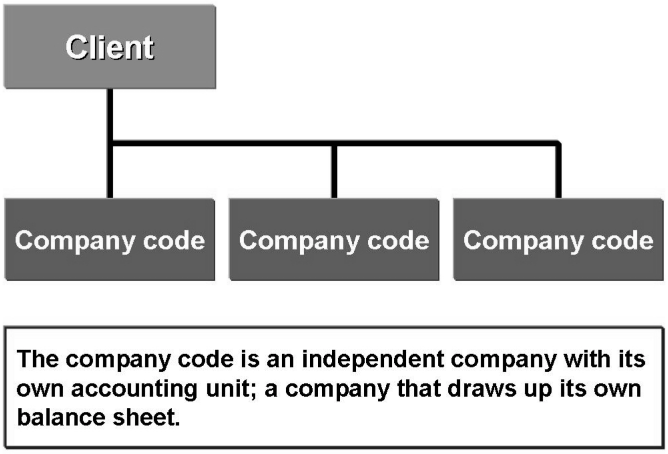


Figure 35: Enterprise Structure - Company Code

The company code represents the highest level of the enterprise structure within a client. If you use the Controlling, Financial Accounting, Materials Management or Sales and Distribution application components as well as the Personnel Administration application component, you must coordinate the company code setup with the other application components. This does not impose any restrictions in the Human Resources areas, as you define all the most important control information at the personnel subarea level anyway.

You define the country grouping at the personnel area level, but each country grouping must be unique within the company code. In other words, you must assign the same country grouping to all personnel areas within a company code. The country groupings control master data entry and the setting up and processing of wage types and pay scale groups in Payroll on a country-specific basis.

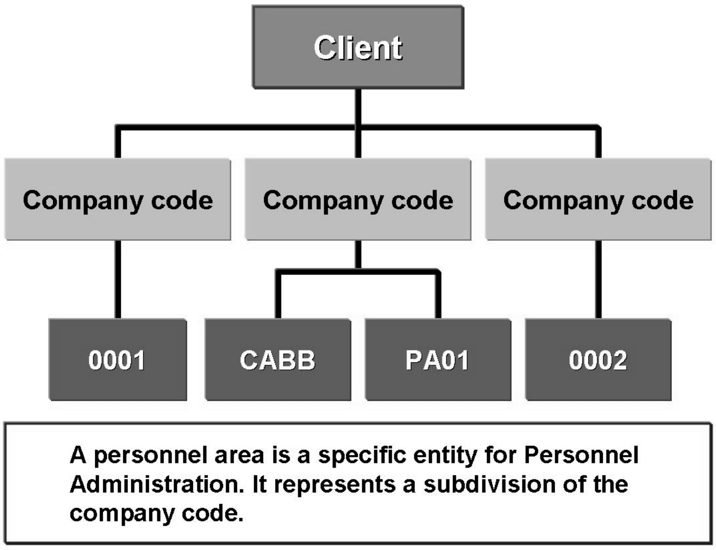


Figure 36: Enterprise Structure - Personnel Area

The personnel area has the following functions:

- The personnel area is a selection criterion for evaluations.
- The personnel area is an entity for authorization checks.
- You must uniquely assign personnel areas to company codes.
- You can use the personnel area to generate default values for data entry, for example, for the payroll area.

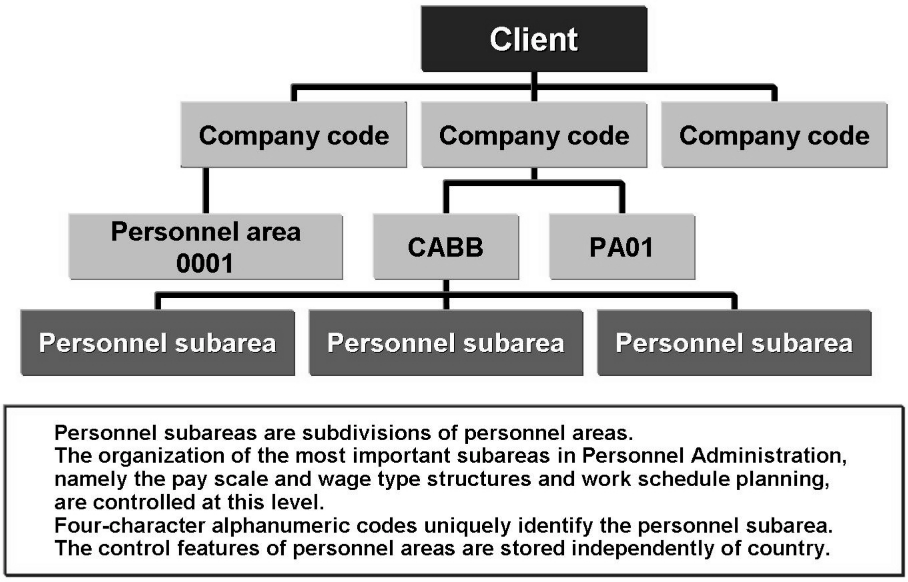


Figure 37: Enterprise Structure - Personnel Subarea

Personnel areas are divided into personnel subareas. You define the regulations for employees at the personnel area and personnel subarea level. These may be legal, contractual, or company-specific regulations. You assign a company code to a personnel area. You must add to the company code any financial accounting data relevant to the personnel area. You must define one pay scale area, one pay scale type, and one holiday calendar for each personnel subarea.

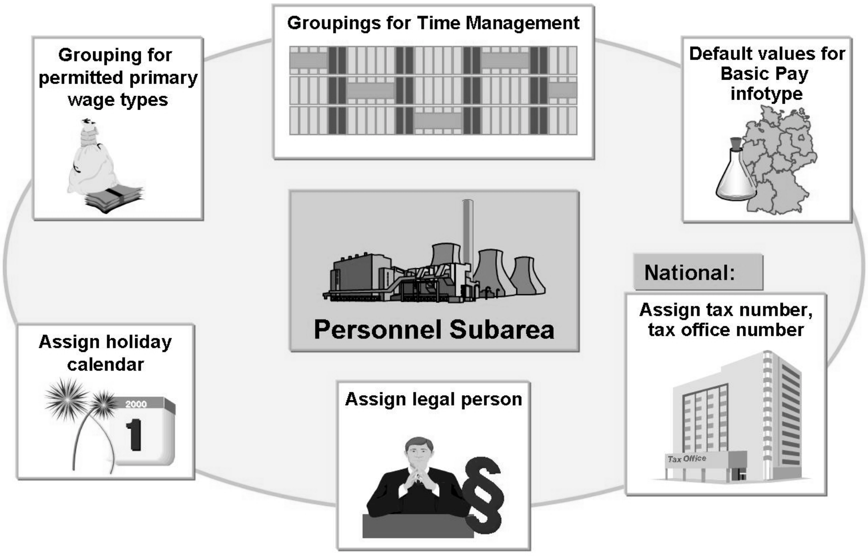


Figure 38: Indicators Defined Using the Personnel Subarea

The following indicators are defined by the personnel subarea:

- International (T001P)
  - Default values for pay scale area and pay scale type
  - Assignment of personnel subarea to a public holiday calendar, legal person, and statistics group
  - Grouping of personnel subareas for vacation, work schedule, attendance and absence types, substitution and availability types, attendance and absence counting, time recording, time quotas, and premiums.
  - Personnel subarea grouping for permissibility of primary wage types
  - Grouping of personnel subareas for appraisals
- National (for example, for Germany in T5D0P)
  - Assignment of tax relevant corporate features (church tax area, tax office number, tax number)
  - Flat-rate Church Tax
  - DUEVO check
  - Miner's and mine-employee's insurance company number

Enterprise Structure for CAB Company

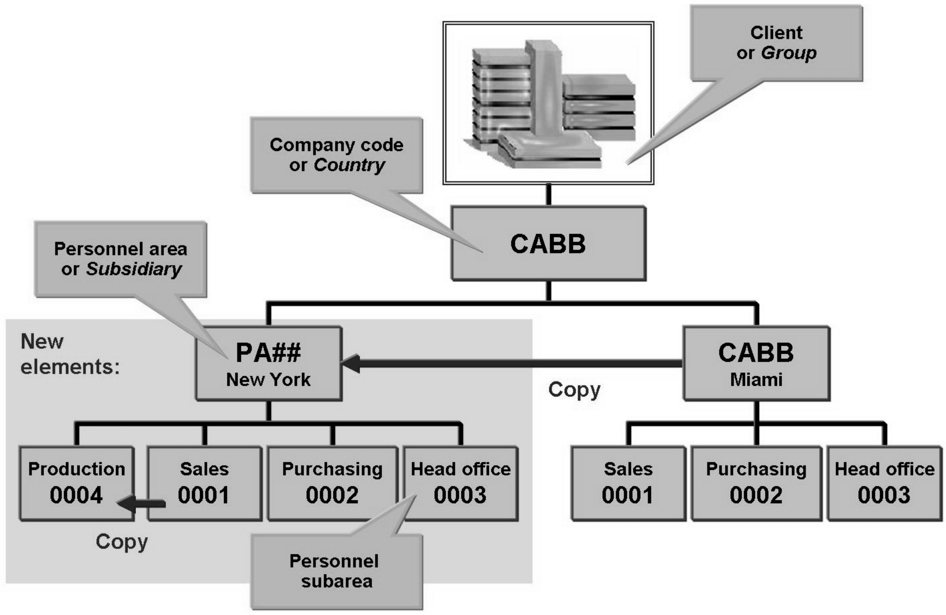


Figure 39: Enterprise Structure of Your Company

You must depict the structure of your company in the SAP system. The graphic shows the enterprise structure of your company, which is an example of how to depict an enterprise structure in the SAP system.

To create a new personnel (sub)area, SAP recommends that you copy an existing personnel (sub)area using an entity copier.

Enterprise Structure Copy Function

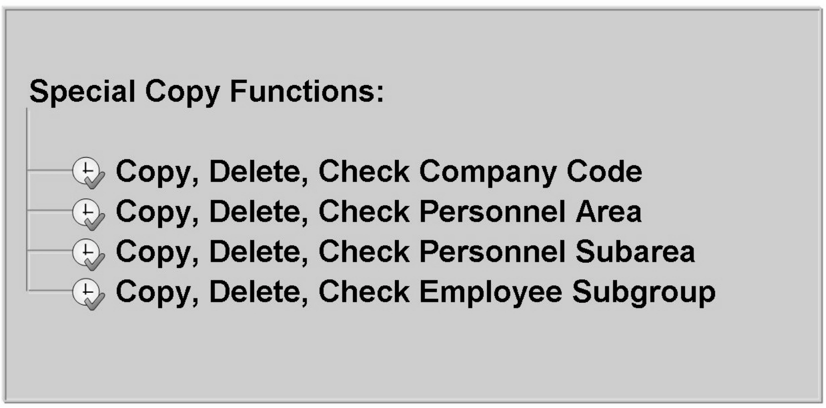


Figure 40: Enterprise Structure: Copy Function (1)

You can use the copy function to create new elements of the enterprise structure quickly and easily, so that you do not have to call up the subsequent tables individually.

You can use the copy function for company codes, personnel areas, personnel subareas, and employee subgroups. You can:

- Copy
- Delete
- Check
- Create and edit project IMG views

A number of control indicators are connected to elements of the company structure. You can then access them on subsequent screens.

Enterprise Structure: Copy Function (2)

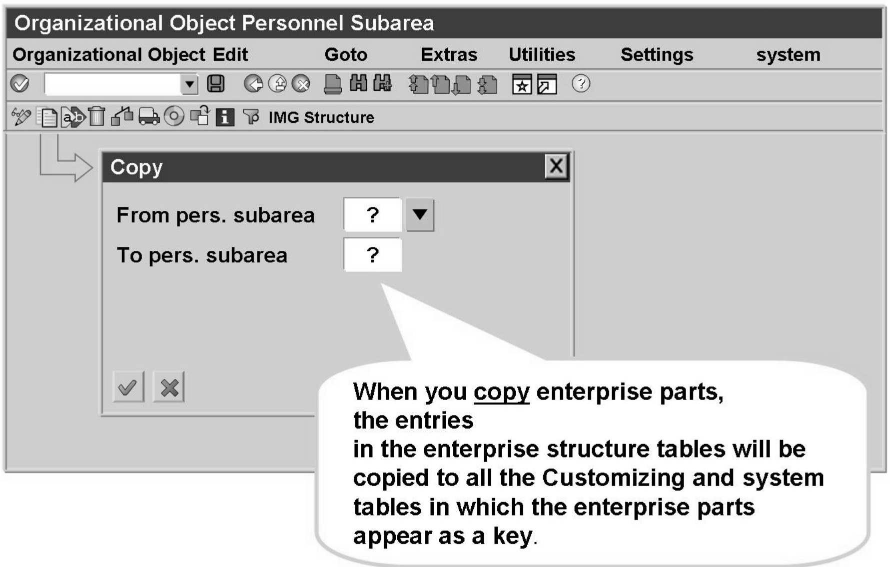


Figure 41: Enterprise Structure: Copy Function (2)

Copy

Use this function if you want to create a new organizational entity and use the existing settings as a template.

If you have already carried out the system settings for the organizational unit that you have just created, you can still use the copy function. In this case, the system only duplicates the entries that are missing. Existing entries remain unchanged. The result of this copy action is a project IMG view that contains all the objects changed by the copy action. This means that you can post-process the entries that the system has copied.

Delete

Use this function if you want to delete an existing organizational unit and all of its dependent entries.

Check

Use this function to check the settings of existing organizational units.

The check is carried out in two steps:

In the first step, the system checks to see whether there is an entry in all the tables in which the organizational entity specified is entered as a table key.

In the second step, the system checks to see whether there is an entry in the dependent tables validated against the table key.

Exercise 5: Enterprise Structure

Exercise Objectives

After completing this exercise, you will be able to:

- Create a personnel area and a personnel subarea.

Business Example

The recently purchased production plant must be created as a personnel area of the local company. In this personnel area, there will be a head office, a purchasing department, and a production department.

Task 1:

For the following exercises, use the **project IMG HR305**.

Create the new personnel area **PA##**, (## = your group number) and give it the name **Gr##**, which should be a copy of personnel area *CABB Caliber A Bicycle Company*.

1. In the *Personnel Areas* IMG activity, use the Copy function to create your new personnel area.
2. Use the *Create Personnel Areas* action to change the name of your newly created personnel area.

Task 2:

Create the new personnel subarea **0004**, and name it **Production ##**. This personnel subarea should be a subunit of your personnel area PA##.

1. Use the Copy function in the IMG activity *Personnel Subareas* to create your new personnel subarea based on the subarea *Sales (0001)* in the personnel area *PA##*.
2. Use the *Create Personnel Subareas* action to change the name of your newly created personnel subarea.

Solution 5: Enterprise Structure

Task 1:

For the following exercises, use the **project IMG HR305**.

Create the new personnel area **PA##**, (## = your group number) and give it the name **Gr##**, which should be a copy of personnel area *CABB Caliber A Bicycle Company*.

1. In the *Personnel Areas* IMG activity, use the Copy function to create your new personnel area.
   a) *SAP Menu: Tools → Customizing → IMG → Execute Project.*
   b) Select the project IMG *HR305* from your worklist (double click), or go directly into your IMG if you have defined it as a standard project.
   c) *Enterprise Structure → Definition → Human Resources → Personnel Areas*
   d) Select the action: *Copy, Delete, Check Personnel Area*.
   e) Choose *Copy org.object*.
   f) Enter *CABB* in the *From personnel area* field. Enter *PA##* in the *To personnel area* field.
   g) Choose *Enter*.
   h) Note the system message *Note the list of affected features in the statistics*.
   i) Note the system message *Personnel area CABB was copied to PA##.*
   j) Return to the *Choose Activity* dialog box.
2. Use the *Create Personnel Areas* action to change the name of your newly created personnel area.
   a) Select the *Personnel Areas* action.
   b) Select your own personnel area and choose Details.
   c) Assign it a name that contains your group number and, if required, a new address.

Continued on next page

Task 2:

Create the new personnel subarea **0004**, and name it **Production ##**. This personnel subarea should be a subunit of your personnel area PA##.

1. Use the Copy function in the IMG activity *Personnel Subareas* to create your new personnel subarea based on the subarea *Sales (0001)* in the personnel area *PA##*.
   a) *Enterprise Structure → Definition → Human Resources → Personnel Subareas*
   b) Select the action: *Copy, Delete, Check Personnel Subarea*.
   c) Choose *Copy org.object*.
   d) In the *From personnel subarea* field, enter the value *0001* (Sales) of personnel area *PA##* from the list of possible entries. Enter *0004* in the *To personnel subarea* field.
   e) Choose *Continue*.
   f) Note the system message: *Data already exists for organizational object 0004. Do you want to complete this organizational object?* Select *Yes*.
   g) Note the system message *Note the list of affected features in the statistics*.
   h) When the system requests the personnel area, enter *PA##*.
   i) Note the system message *Personnel subarea 0001 was copied to 0004.*
   j) Return to the *Choose Activity* dialog box.
2. Use the *Create Personnel Subareas* action to change the name of your newly created personnel subarea.
   a) Select the *Create Personnel Subareas* action.
   b) Enter the personnel area *PA##*.
   c) Change the name of personnel subarea *0004* to *Production ##*.
   d) Choose *Save* and return to the IMG.

Lesson Summary

You should now be able to:

- Describe the meaning and elements of the enterprise structure
- Modify the enterprise structure using the entity copier

Lesson: Personnel Structure

Lesson Overview

The elements of Personnel Structure are explained in this lesson and modified using the entity copier.

The options for checking the modified structure are explained.

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the meaning and elements of the personnel structure
- Understand the modification of the personnel structure using the entity copier
- Check the assignments

Business Example

Since a new manufacturing plant was bought, it is necessary to map the new personnel structure in the SAP system.

Overview of Personnel Structure

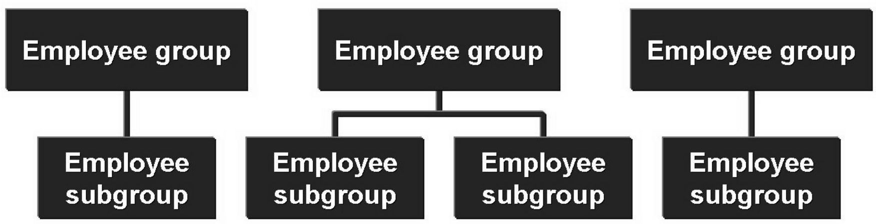


Figure 42: Overview: Personnel Structure

The personnel structure displays the position of individual people in the enterprise as a whole.

Parts of the Personnel Structure

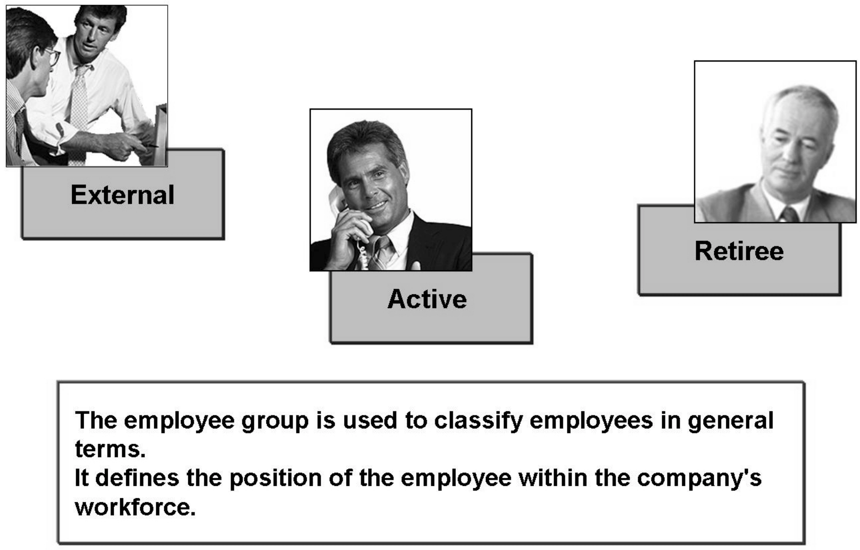


Figure 43: Personnel Structure: Employee Group

The employee group has the following important organizational functions:

- You can use it to generate default values for data entry, for example, for the payroll accounting area or an employee's basic pay.
- You can use it as a selection criterion for reporting.
- You can use it as an entity for authorization checks.
- As a rule, you can use the standard entries in the system for setting up employee groups. If necessary, you can also add to these entries so that they meet your requirements.

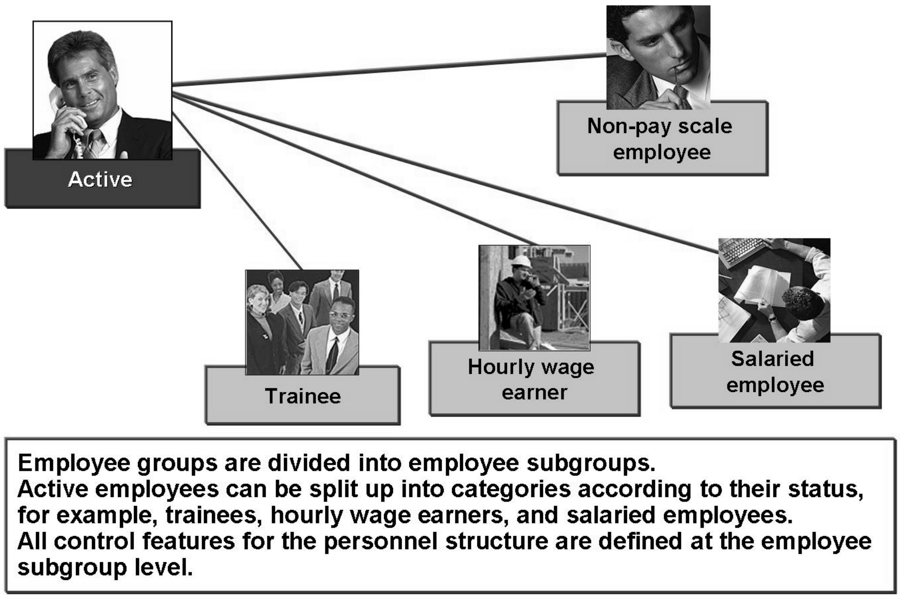


Figure 44: Personnel Structure - Employee Subgroup

An employee group consists of a number of employee subgroups. For example, the following employee subgroups make up the 'Active' employee group:

- Hourly wage earners
- Monthly wage earners
- Pay scale employees
- Non-pay scale employees

You define each employee subgroup in Customizing assigning a two character alphanumeric identifier to each.

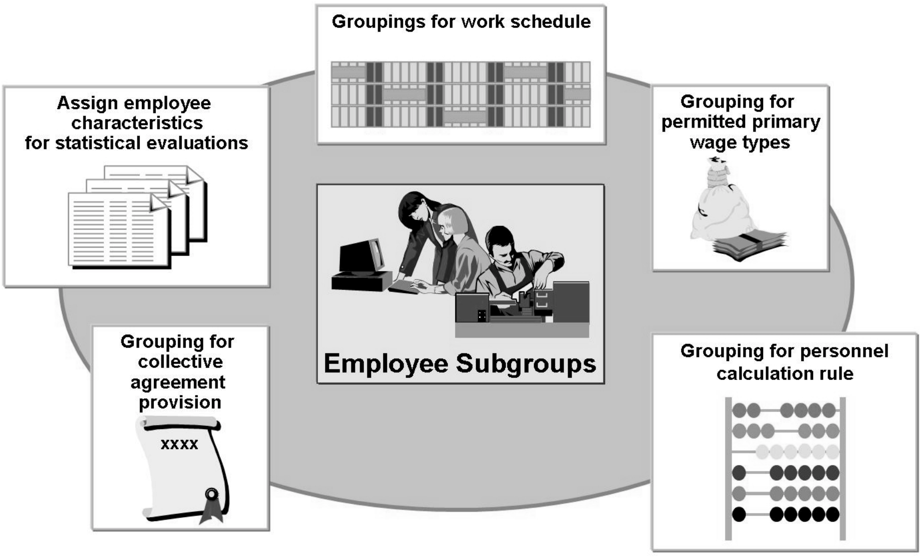


Figure 45: Indicators Defined By Employee Subgroups

You can use the employee subgroup to set the following indicators:

- International
  - The employee subgroup grouping for the work schedule allows you to define which work schedules are valid for which employees.
  - The employee subgroup grouping for primary wage types controls the validity of wage types at the employee subgroup level.
  - The employee subgroup grouping for the personnel calculation rule controls how the system processes an employee's payroll, for example, whether an employee is to be paid on an hourly or monthly basis.
  - The grouping for collective agreement provision restricts the validity of pay scale groups to specific employee subgroups.
  - You can also assign employee characteristics, such as the activity status, employment status, and level of education/training, for statistical purposes.
  - Additional indicators that can be set using the employee subgroup:

    ▷The employee subgroup grouping for time quotas allows you to specify which attendance and absence quota types are valid for which employee subgroups.

    ▷The employee subgroup grouping for appraisals allows you to define appraisal criteria for each employee subgroup.

    ▷The employee subgroup allows you to define default values for data entry, for example, for the payroll area or basic pay.
- National (for example, Germany)
  - Default values for social insurance

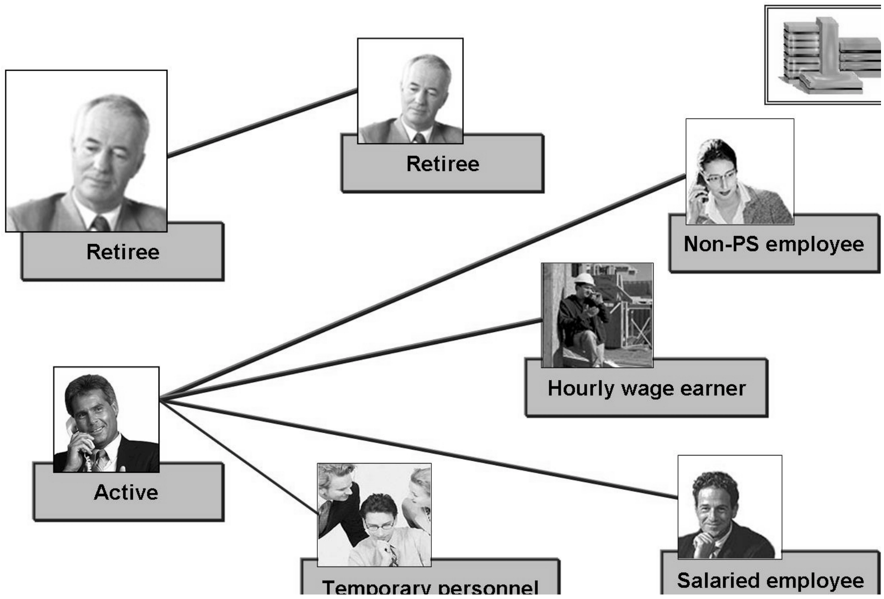


Figure 46: Personnel Structure in Your Company

You must depict the changes to the personnel structure in your company in the SAP system.

The graphic shows your company's personnel structure, which you can use as an example of how to depict a personnel structure in the SAP system.

Assignments

Personnel Area - Company Code

Pers.area	Personnel area text	Company code	Name of company	Country Grpg
AT01	Personnel Area AT01	AT01	Country Template AT	03
AV01	Australian Personnel	AV01	Country Template AV	13
BE01	Personnel area BE01	BE01	Country Template BE	12
CA01	Personnel area CA01	CA01	Country Template CA	0

The country grouping classifies countries according to human resource focal points.

Employee Group - Employee Subgroup

EEGrp	EE group text	EESgrp	EE Subgroup text
1	**Active**	X0	**Salaried EE**
1	**Active**	X1	**Hourly wage earner**

EE group 1 Active
EE subgroup DA Trainee ind.

Ctry	Name	Allowed
	Germany	✓
	Switzerland	
	Austria	

Figure 47: Assignments

You define the relationship between organizational entities here.

- Your personnel area is assigned to a company code. When you create a personnel number, the system assigns a relevant company code in the Organizational Assignment infotype (0001) depending on which enterprise structure you have assigned the employee. In addition, you assign the country grouping to a personnel area in this table. Make sure that you assign all personnel areas in one company code to the same country grouping.
- Assign your employee subgroups to the relevant employee groups. You can also define permissible employee group/employee subgroup combinations for your country groupings. For example, you should assign the employee subgroup Trainee to the employee group Active and not to the employee group Retiree.

Exercise 6: Personnel Structure

Exercise Objectives

After completing this exercise, you will be able to:

- To copy an employee subgroup and check the assignments of the company structure and the personnel structure

Business Example

In the personnel subarea Production, there will be a new group of hourly wage earners, which must be created as an employee subgroup.

Task 1:

Create a new employee subgroup for the production plant. Use your group number (##) as a new employee subgroup number.

1. In the *Employee Subgroups* IMG activity, use the Copy function to copy your new employee subgroup (##) from employee subgroup **X1 Hourly wage earners**.
2. Use the *Define Employee Subgroup* action to change the name of your new employee subgroup. The new name should contain your group number.

Task 2:

Take a look at the steps in your project IMG that are linked to your new enterprise structure, and answer the following questions:

1. To which company code is your new personnel area *PA##* assigned? Why has the system already made this assignment?

   ____
   ____
   ____
   ____

2. Which country grouping is assigned to this company code?

   ____
   ____
   ____
   ____

Continued on next page

3. Why are country groupings essential to HCM components?

4. Describe, in your own words, the basic difference between an assignment and a grouping.

Task 3:

The following exercises are optional.

Take a look at the steps in your project IMG that are linked to your new employee subgroup, and answer the following questions:

1. Is your new employee subgroup (##) assigned to employee group *1 Active* and country grouping 99 (other countries)?

2. What do you set up with the Customizing step *Employee Subgroups for Primary Wage Type*?

Solution 6: Personnel Structure

Task 1:

Create a new employee subgroup for the production plant. Use your group number (##) as a new employee subgroup number.

1. In the *Employee Subgroups* IMG activity, use the Copy function to copy your new employee subgroup (##) from employee subgroup **X1 Hourly wage earners**.
   a) *Enterprise Structure → Definition → Human Resources Management → Employee Subgroups*. Select the *Edit employee subgroup environment* action.
   b) Choose *Copy org.object*.
   c) In the *From employee subgroup* field, enter the employee subgroup *X1 Hourly wage earner*, and in the *To employee subgroup* field, enter your group number.
   d) Note the system message *Please note the list of affected features in the statistics*.
   e) Select *Continue*.
   f) Note the system message *Employee subgroup X1 was copied to ##.*
   g) Return to the *Choose Activity* dialog box.
2. Use the *Define Employee Subgroup* action to change the name of your new employee subgroup. The new name should contain your group number.
   a) Select the action *Define Employee Subgroup*.
   b) Select *Position* to find your employee subgroup (##).
   c) Change the employee description for the employee subgroup to *Hourly wage earner ##.*
   d) Choose *Save* and return to the IMG.

Continued on next page

Task 2:

Take a look at the steps in your project IMG that are linked to your new enterprise structure, and answer the following questions:

1. To which company code is your new personnel area *PA##* assigned? Why has the system already made this assignment?

   Answer: CABB

   To find this information, proceed as follows in the IMG:

   Enterprise Structure → Assignment → Human Resources Management → Assignment of Personnel Area to Company Code

   Search for the personnel area *PA##* using *Position*.

   Look at the entry in the *Company code* field: *CABB*.

   The system made the assignment automatically when you copied the personnel area in the preceding exercise. The copy template (personnel area CABB) is also assigned to company code CABB.

2. Which country grouping is assigned to this company code?

   Answer: Country grouping 99 (other countries)

   To find this out, proceed as follows in the IMG:

   Enterprise Structure → Assignment → Human Resources Management → Assignment of Personnel Area to Company Code

   Search for the company code CABB using *Position*.

   Look at the entry in the *Country grouping* field: *99*.

3. Why are country groupings essential to HCM components?

   Answer: Within the HR component, country groupings serve to differentiate between countries according to human resources criteria.

   Technically, the country grouping is a key field in tables that allows you to create data, such as wage types and pay scale tables, for specific countries. This, for example, allows you to run payroll for several countries.

4. Describe, in your own words, the basic difference between an assignment and a grouping.

   Answer: For an assignment, you link a personnel subarea or employee subgroup directly with another subject.

   For a grouping, you first group together personnel subareas or employee subgroups that share certain attributes. Then you allocate this grouping to another subject in a second Customizing step.

Continued on next page

Task 3:

The following exercises are optional.

Take a look at the steps in your project IMG that are linked to your new employee subgroup, and answer the following questions:

1. Is your new employee subgroup (##) assigned to employee group *1 Active* and country grouping 99 (other countries)?

   Answer: *IMG: Enterprise Structure → Assignment → Human Resources Management → Assign Employee Subgroup to Employee Group*

   Select *Position* to find your employee subgroup. Check whether your employee subgroup (##) is assigned to the employee group Active *(1)*. If you double click this line for your employee subgroup, or if you choose *Details*, the system displays the country grouping assigned to your employee subgroup.

   Note: *The system made this assignment automatically when you copied the employee subgroup in the previous exercise.*

   Return to the IMG.

2. What do you set up with the Customizing step *Employee Subgroups for Primary Wage Type*?

   Answer: *IMG: Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Employee Subgroups for Primary Wage Type*

   You can group together your employee subgroups. In other words, all employee subgroups that are identical in terms of the permissibility of primary wage types.

   Your employee subgroups ## may have grouping 1 (because copy template X1 Hourly wage earners also has this grouping). In a further Customizing step, you can specify which wage types can be used for this employee subgroup grouping. This also means these wage types would be used for all employee subgroups with grouping 1. There is more information on this in a later unit.

Lesson Summary

You should now be able to:

- Describe the meaning and elements of the personnel structure
- Understand the modification of the personnel structure using the entity copier
- Check the assignments

Unit Summary

You should now be able to:

- Describe the meaning and elements of the enterprise structure
- Modify the enterprise structure using the entity copier
- Describe the meaning and elements of the personnel structure
- Understand the modification of the personnel structure using the entity copier
- Check the assignments

Unit 5

Organizational Structure

Unit Overview

This section explains the most important elements of an organizational structure and how they relate to each other. In Organizational Management, you store default values for a position that then appear in Personnel Administration in the relevant fields when you hire a new employee. In Customizing, you can see the relevant part in the IMG where you can switch integration on and off.

Unit Objectives

After completing this unit, you will be able to:

- Map the organizational structure of your company in the SAP system
- Set up the link between the Organizational Structure and the Enterprise Structure.

Unit Contents

Lesson: Organization Structure

Lesson Overview

The most important parts of organizational structure are discussed in this lesson.

The organizational structure is described in Organizational Management in the "Change Organization and Staffing" screen.

Data stored on the position should be proposed in Personnel Administration from Organizational Management when integration has started.

Lesson Objectives

After completing this lesson, you will be able to:

- Map the organizational structure of your company in the SAP system
- Set up the link between the Organizational Structure and the Enterprise Structure.

Business Example

Buying a production plant has also caused your reporting and cost center structure to change.

In addition, there is a large number of new employees that you need to include in your company's organizational plan.

The changes to your organizational structure have already been made. It is your task to create a link to Personnel Administration.

Organizational Plan

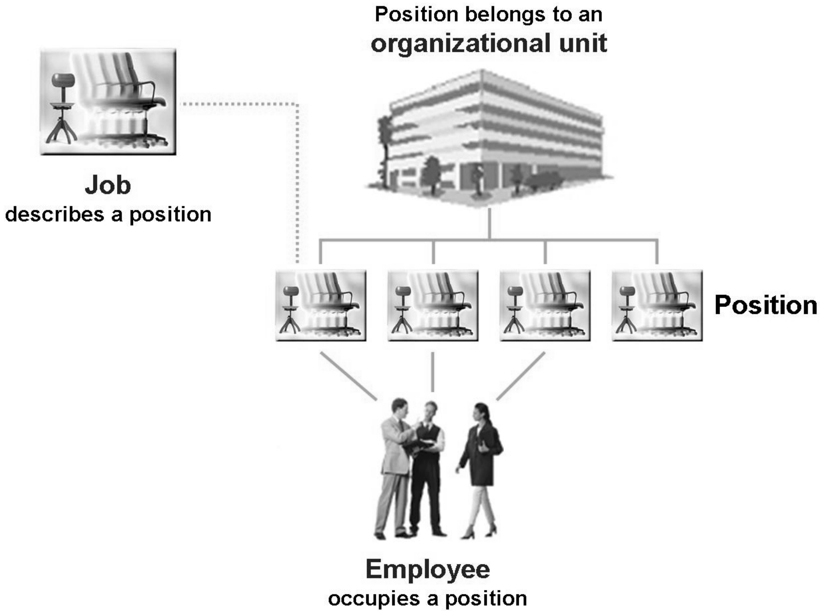


Figure 48: Organizational Plan

The organizational plan depicts the organizational structure. A company uses an organizational plan to represent the relationships between individual departments and work groups. The SAP system uses **organizational units** for this.

The “Purchasing” department, or organizational unit, employs one secretary, one manager, and 10 purchasers. The department has 12 **positions**.

Persons or employees carry out activities. Persons are a fundamental part of the organizational structure.

Parts of Organizational Management

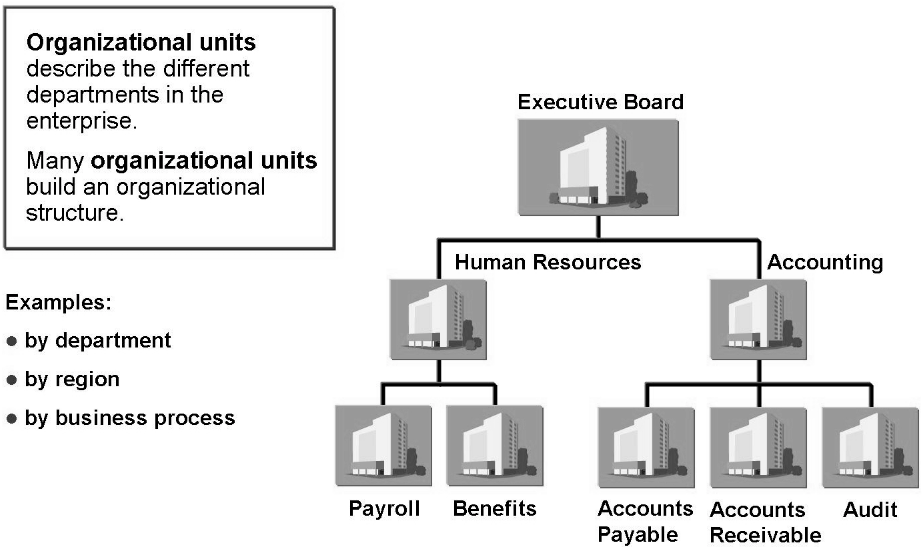


Figure 49: Organizational Units

You can divide organizational units generally (according to regional aspects) or more precisely (according to project group). This depends on the company-specific requirements.

Organizational units could be departments, teams, groups, and so on.

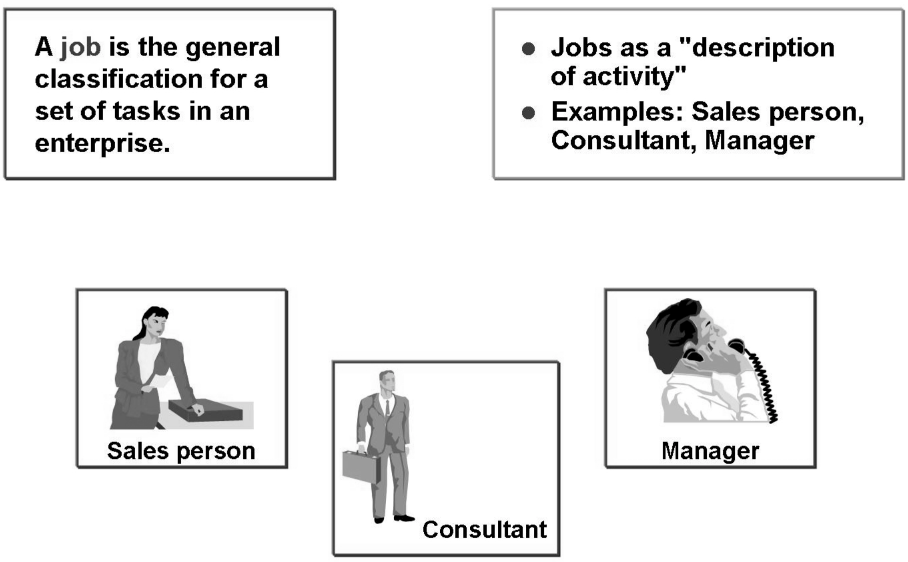


Figure 50: Jobs

Positions describe concrete areas in an enterprise that need to be covered by available personnel (such as European Manager). **Jobs**, however, are a general classification of tasks within the enterprise (such as Manager). You can further define these jobs by assigning characteristics. In this way, you create job descriptions valid for several positions with similar tasks and characteristics.

When you create a new position (such as European Manager), you can link it to an existing job (such as Administrator). This ensures that the new position automatically inherits the tasks and characteristics assigned to the job.

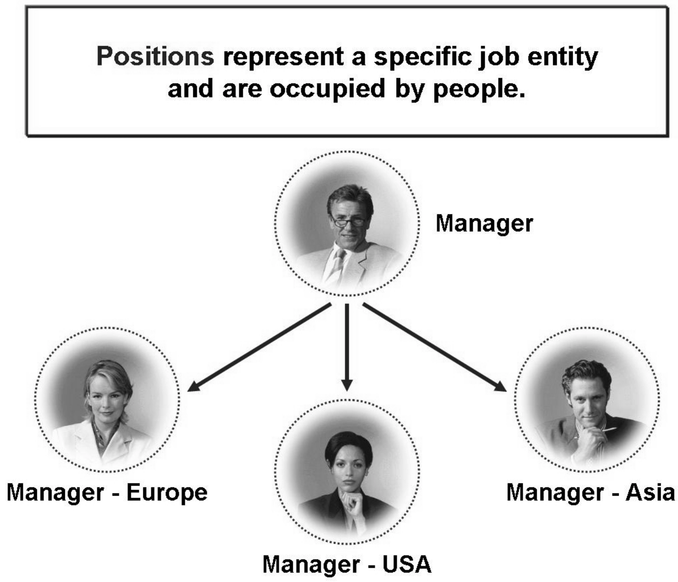


Figure 51: Positions

You assign the employees in your company to positions. This ensures that the employees are included in the organizational structure. By using additional data created in the system, such as links, you can also map the reporting structure of your company.

You can also link pay to positions, for example. You maintain the data for valuating a position in the Wage Type Structure unit in the “Basic Pay” section. This applies if you have employees whose pay is based on the value of a position.

Example: you have employees who you assigned to a position in the Organizational Assignment infotype (0001). The pay for this position is x EURO. The employee is to be remunerated with the value for this position (ARBPL module. For more information on this, refer to the the Wage Type Structure unit).

Organizational Structure of Your Company

Figure 52: Organizational Structure of Your Company (1)

The graphic shows how you map your company's organizational structure in the SAP system.

You define the different departments and subdivisions as organizational units. This often reflects a company's cost center hierarchy.

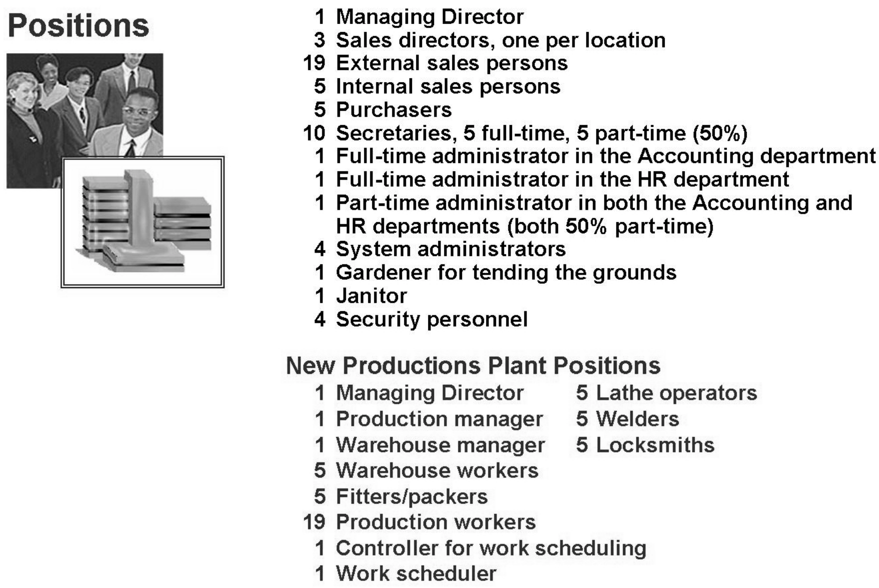


Figure 53: Organizational Structure of Your Company (2)

The graphic shows your company's organizational structure, which you can use as an example of how to depict an organizational structure in the SAP system.

Employees occupy the individual positions.

Integration Between Organizational Management and Personnel Administration

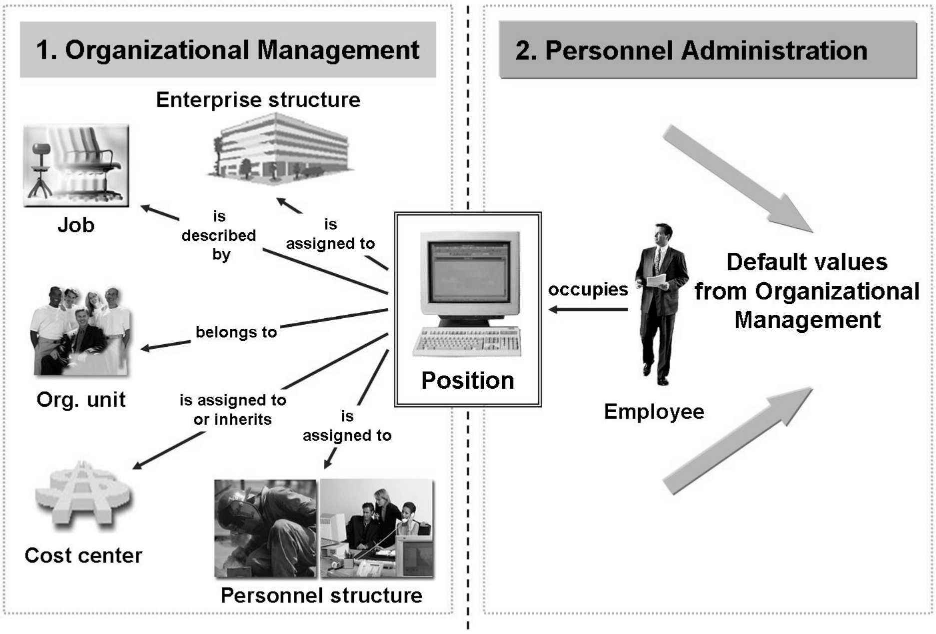


Figure 54: Integration Between Organizational Management and Personnel Administration

If you integrate Personnel Administration and Organizational Management, you can enter a position in the Actions infotype (0000). By doing this, the system proposes the values stored in Organizational Management for employee group, employee subgroup, personnel area, and personnel subarea as default values.

The system also includes the values for job, organizational unit, and cost center, but you cannot overwrite these entries in the Organizational Assignment infotype (fixed assignment).

"Change Organization and Staffing" Transaction

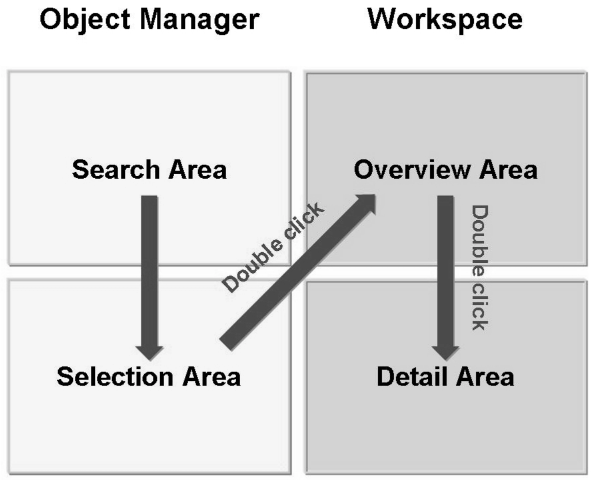


Figure 55: Change Organization and Staffing screen layout

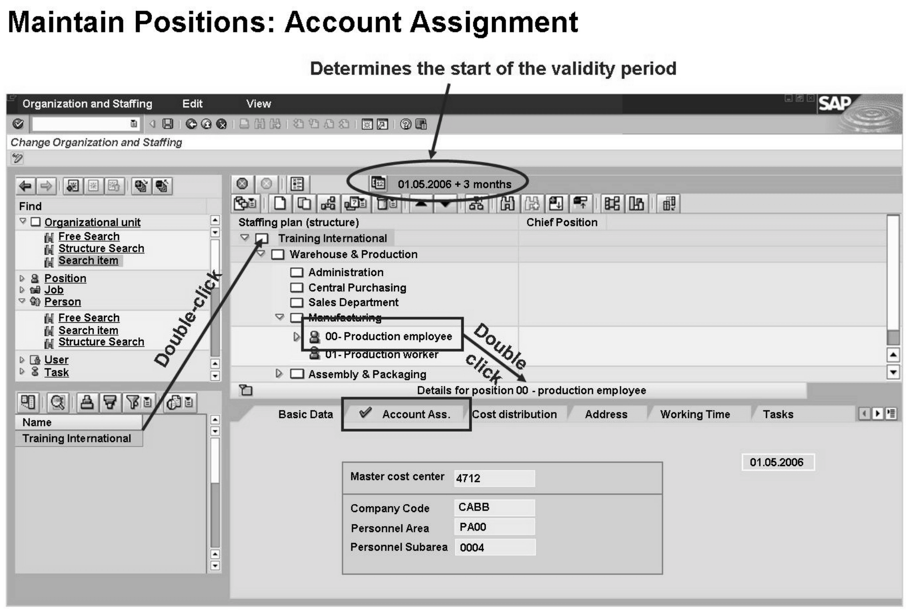


Figure 56: Maintain Positions: Account Assignment

You can set up the following using the **Account Assignment** tab page:

- The graphic shows you how the system stores the relationships between the positions and the *enterprise structure*.
- To depict your enterprise's *Cost Center hierarchy* in the system, you link the cost centers to the relevant organizational units. You can also link the cost centers to jobs and positions.

Maintain Positions: Working Time

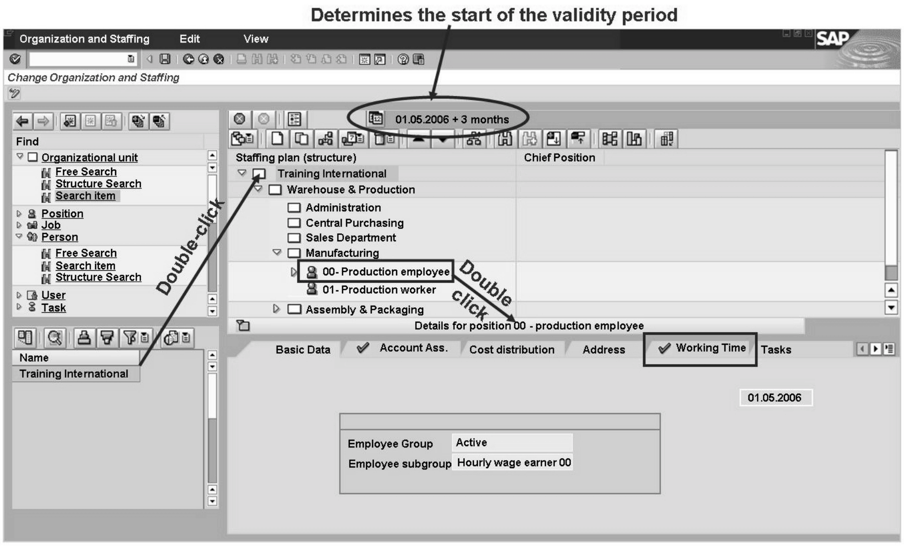


Figure 57: Maintain Positions: Working Time

You can set up the following using the **Working Time** tab page:

- The graphic shows you how the system stores the relationships between the positions and the personnel structure.

Consequnces of Integration

Entering the Position in the Actions Infotype

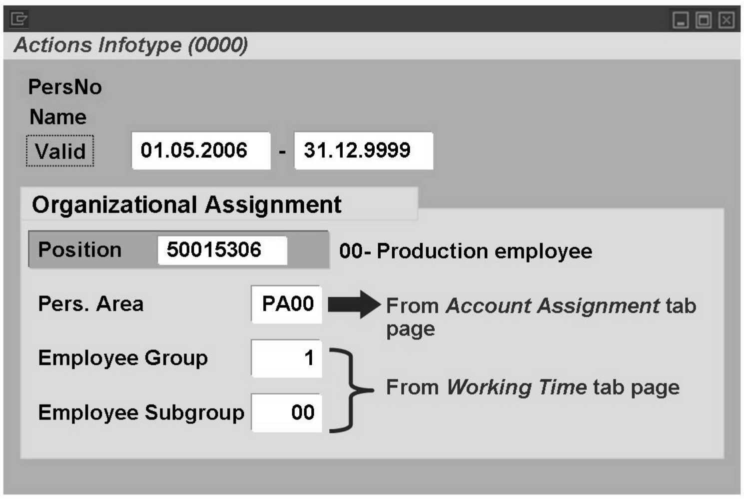


Figure 58: Entering the Position in the Actions Infotype

If you integrate Personnel Administration and Organizational Management, you can enter the position in the Actions infotype (0000) when you run a hiring action. By entering the position, the system propagates the data stored in Organizational Management into the fields in the Actions infotype (0000) as shown in the graphic.

Values from Organizational Management

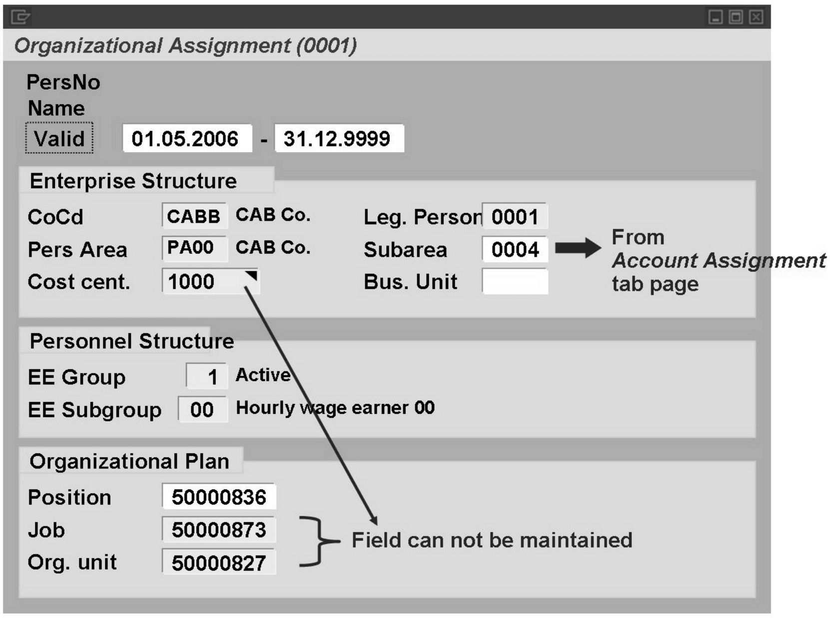


Figure 59: Values from Organizational Management

The system takes the default values for the employee group and subgroup from the data stored on the position in the Employee Group/Subgroup infotype (1013), which you can maintain on the **Working Time** tab page.

The system takes the default values for the business area, personnel area, and the personnel subarea from the data stored on the position (or the organizational unit) in the Account Assignment Features infotype (1008), which you can maintain in the **Account Assignment** tab page.

If the Personnel Administration and Organizational Management components **are not integrated**, you must manually enter the values for the cost center, position, job, and organizational unit in the Organizational Assignment infotype.

However, if Organizational Management **is integrated**, you cannot maintain these fields in the Organizational Assignment infotype. The system fills these fields automatically from Organizational Management.

Activate Integration

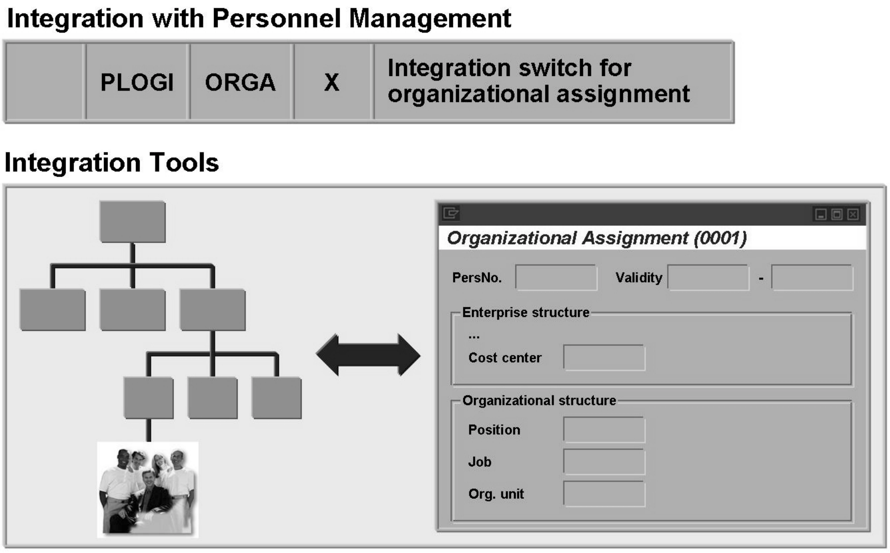


Figure 60: Setting Up Integration between Personnel Administration and Organizational Management

The system stores the relationship between Personnel Administration and Organizational Management in Customizing: *Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Set up Integration with Personnel Administration: Basic Settings.*

Use the PLOGI ORGA switch to determine whether integration with the Organizational Assignment infotype (0001) takes place.

You can use the PLOGI feature in conjunction with the organizational assignment (employee subgroup, personnel area, and so on) to specify which groups of employees can participate in integration. There are several ways to activate integration. This depends on the system you use in the company.

- You have implemented Personnel Administration and would like to re-customize Organizational Management. In this instance, the system converts the entries in the relevant Personnel Administration tables for the personnel planning objects.
- You have implemented Organizational Management and would like to re-customize Personnel Administration. You can automatically copy and transfer the existing entries from the Organizational Assignment infotype (0001).
- You want to implement both components again. You do not have to manually enter the data in Personnel Administration as the data that was entered when the systems were previously integrated will be maintained in the Organizational Management component.

Exercise 7: Organizational Structure

Exercise Objectives

After completing this exercise, you will be able to:

- Store a link between a position and the enterprise and personnel structure

Business Example

An organizational structure has already been created with several production worker positions. You now need to create the link between a position and your new structure elements. This ensures that any new employees who you hire for this position are automatically included in your company's organizational structure. You will complete the hiring process for these employees in later units.

Task 1:

Go into Organizational Management, and into the change mode for *Organization and Staffing*, and search for the organizational unit CABB. In the Training International area is the *Production* organizational unit, which contains the *Central Production* organizational unit, which in turn contains the *## Production Worker* positions.

Select the position for your group number by double-clicking it, and edit the details for your position. Make sure that the start date under *Date and Preview Period* is set to the first of this month. You should also use this date as the hiring date for the second employee you hire.

1. Edit the *Account assignment* tab page to assign your production worker position *(## Production Worker)* to the company code *CABB*, the personnel area *PA##*, and your personnel subarea *Production (0004)*. Leave the remaining fields blank.
2. Edit the *Working Time* tab page to assign your production worker positions *(## Production Worker)* to the employee group *Active*, and to your new employee subgroup (##).

Task 2:

Use the personnel action *Hiring HR305* to hire the new production worker to work in your personnel subarea.

1. Use the personnel number *305992##* (## = your group number), and the first of the current month as the hiring date. On the *Personnel Actions* screen, leave the fields *Personnel area, Employee group*, and *Employee subgroup* empty.

Continued on next page

2. Use the structure search on the *Create Actions screen* (IT 0000) to search for the ## *Production Worker* position. See the path: *Org. Units HR Training Group → Training International → Production → Central Production*.

3. Choose *Enter*, before you save the *Actions* infotype. What happens?

   ____

   ____

4. Save the *Actions* infotype. Which data that you had not yet specified is defaulted on the next *Organizational Assignment* screen (infotype 0001)?

   ____

   Hint: After you have maintained and saved the entries in infotypes 0000 and 0001, STOP the hiring personnel action by selecting "Exit". When the system prompts you to do so, delimit the vacancy to the default date.

Task 3:

1. What IMG path do you follow to call the activity for integrating Organizational Management with Personnel Administration?

   ____

   ____

   Hint: Do not make any changes to the settings in Customizing.

Solution 7: Organizational Structure

Task 1:

Go into Organizational Management, and into the change mode for *Organization and Staffing*, and search for the organizational unit CABB. In the Training International area is the *Production* organizational unit, which contains the *Central Production* organizational unit, which in turn contains the *## Production Worker* positions.

Select the position for your group number by double-clicking it, and edit the details for your position. Make sure that the start date under *Date and Preview Period* is set to the first of this month. You should also use this date as the hiring date for the second employee you hire.

1. Edit the *Account assignment* tab page to assign your production worker position *(## Production Worker)* to the company code *CABB*, the personnel area *PA##*, and your personnel subarea *Production (0004)*. Leave the remaining fields blank.

   a) *SAP Menu: Human Resources → Organizational Management → Organizational Structure → Organization and Staffing → Change*

   b) In the upper-left screen section, the *Search area,* search for the organizational unit CABB.

   c) The search result, the organizational unit CABB Training International, is displayed in the lower-left screen section, the *Selection area*. By double clicking the result, the structure of the Training International department is displayed in the upper-right screen section, the *Overview area*.

   d) Here you can use the *Date and Preview Period* button to change the start date to the first of the current month. Now choose *Execute*.

   e) Search for your position ## Production Worker using the following path:

      Training International → Production → Central Production

      Hint: Note that you are working in the *Staffing Plan (Structure)* view. (Choose *Goto* in the overview area in the upper-left section of the screen to change views).

   f) Double click your ## Production Worker position, which you can find in the subunit *Production*, to edit the details in the lower-right screen section, the *Detail area*.

   g) Enter the following on the *Account Assignment* tab page:

Continued on next page

h) Company code *CABB* and personnel area *PA##.* Select *Enter*. Now you can enter personnel subarea *0004.*

i) Save the data.

2. Edit the *Working Time* tab page to assign your production worker positions *(## Production Worker)* to the employee group *Active*, and to your new employee subgroup (##).

   a) Choose the Work schedule tab page, and enter the following:

   b) Employee group *Active* and employee subgroup ##.

   c) Save your data and return to the initial screen.

Task 2:

Use the personnel action *Hiring HR305* to hire the new production worker to work in your personnel subarea.

1. Use the personnel number *305992##* (## = your group number), and the first of the current month as the hiring date. On the *Personnel Actions* screen, leave the fields *Personnel area, Employee group*, and *Employee subgroup* empty.

   a) *Human Resources→ Personnel Management → Administration → HR Master Data*

   b) Select *Personnel Actions*.

   c) Select the *Hiring HR305* personnel action.

   d) Enter personnel number *305992##* and the first of the month as the start date.

   e) Choose Execute.

2. Use the structure search on the *Create Actions screen* (IT 0000) to search for the ## *Production Worker* position. See the path: *Org. Units HR Training Group → Training International → Production → Central Production*.

   a) Use the value help function for the Position field, and select the structure search as search help. The ## - *Production Worker* position can be found in the production unit in the *Organizational Units Training Group.*

3. Choose *Enter*, before you save the *Actions* infotype. What happens?

   ____

Continued on next page

a) Note the system message "*Default values were copied from the position.*"

b) The employee group, employee subgroup, and personnel area fields were filled with the position's default values when you choose*Enter*.

4. Save the *Actions* infotype. Which data that you had not yet specified is defaulted on the next *Organizational Assignment* screen (infotype 0001)?

Hint: After you have maintained and saved the entries in infotypes 0000 and 0001, STOP the hiring personnel action by selecting "Exit". When the system prompts you to do so, delimit the vacancy to the default date.

a) Choose *Save*. The next infotype appears in which following values are defaulted:

b) Subarea *0004* (added to position)

c) The contents of the other fields that are filled, such as Payroll area, Administrator group, or Organizational key, are controlled by features. This will be dealt with in subsequent units.

d) Save the data in this infotype and choose *Exit*.

Task 3:

1. What IMG path do you follow to call the activity for integrating Organizational Management with Personnel Administration?

Hint: Do not make any changes to the settings in Customizing.

a) *IMG: Personnel Management → Organizational Management → Integration → Integration with Personnel Administration → Set Up Integration with Personnel Administration*

Lesson Summary

You should now be able to:

- Map the organizational structure of your company in the SAP system
- Set up the link between the Organizational Structure and the Enterprise Structure.

Unit Summary

You should now be able to:

- Map the organizational structure of your company in the SAP system
- Set up the link between the Organizational Structure and the Enterprise Structure.

Unit 6

Additional Organizational Assignment

Unit Overview

The important fields from the Organizational Assignment infotype are discussed in this section. The meaning of fields and possible Customizing settings are also discussed here.

Unit Objectives

After completing this unit, you will be able to:

- Explain the meaning of payroll area and payroll control record
- Name important additional prerequisites for payroll
- Define the structure of the organizational key
- Store administrator responsible
- Save statistical information about the employees within a company

Unit Contents

Lesson: Payroll Area and Organizational Key

Lesson Overview

The terms Payroll Area and Organizational Key are discussed in this lesson.

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the meaning of payroll area and payroll control record
- Name important additional prerequisites for payroll
- Define the structure of the organizational key

Business Example

The structure of payroll areas and organizational keys should be reconsidered.

Additional Organizational Assignment of an Employee

Additional Organizational Assignment of an Employee

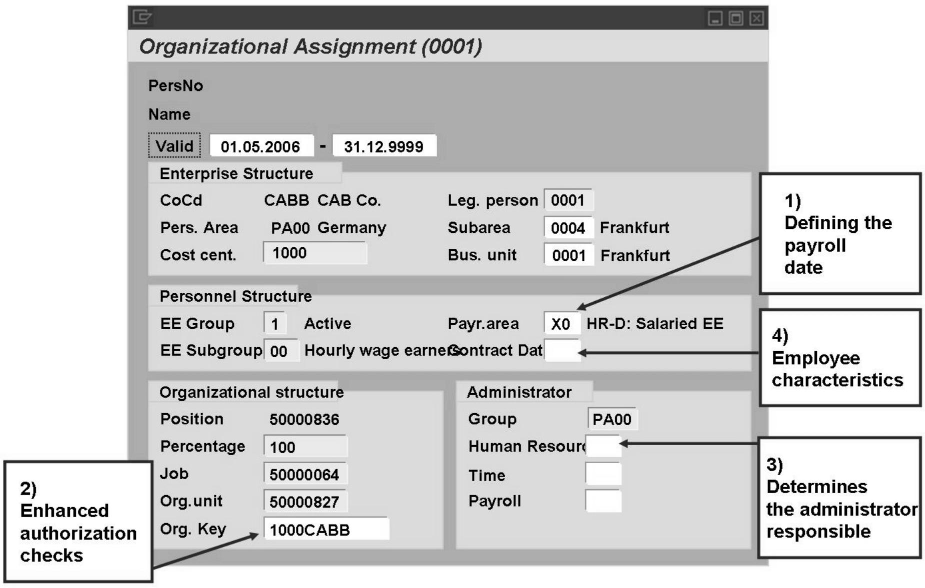


Figure 61: Additional Organizational Assignment of an Employee

You already know most of the indicators in the Organizational Assignment infotype (0001). This unit discusses the remaining indicators, such as the indicators for authorization checks and those that control payroll.

Payroll Area

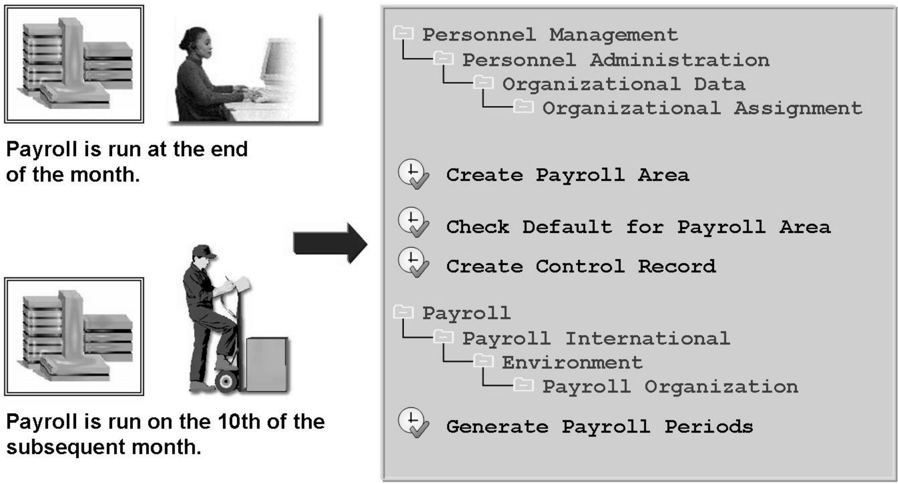


Figure 62: 1) Payroll Area

HCM uses the payroll areas to group together employees who should be processed by payroll on the same day, and to determine the precise date of the payroll. Employees belonging to different employee subgroups can belong to the same payroll area.

For example, if the company pays all of its salaried employees at the end of the month, and all of its hourly-paid employees on the tenth of the following month, then it would need at least two payroll areas.

On the right, you can see the Customizing steps that you need to set up payroll areas, control records, and payroll periods.

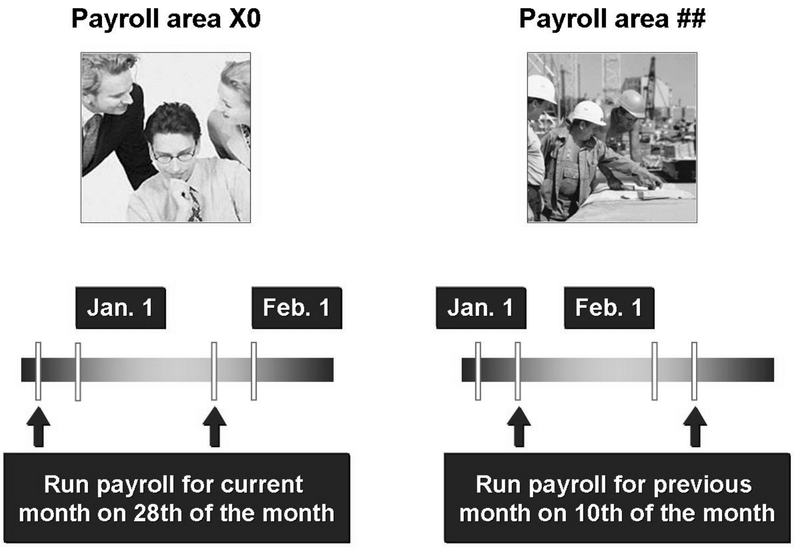


Figure 63: Payroll Organization

The payroll area is an organizational entity that groups employees together so that you can run payroll. You group employees in the same payroll area according to organizational assignment criteria. You should group all employees for whom you run payroll on the **same day** and in the **same frequency** (such as monthly).

The payroll area has two functions required for payroll:

- It groups the personnel numbers to be accounted in the same period.
- It defines the exact date of the payroll period.

Personnel numbers are assigned to payroll areas in the Organizational Assignment infotype (0001). The default value that appears in the Payr. Area field depends on the organizational assignment of the employee. (See the Defining Default Values - Features unit for more detailed information.)

Payroll Control Record

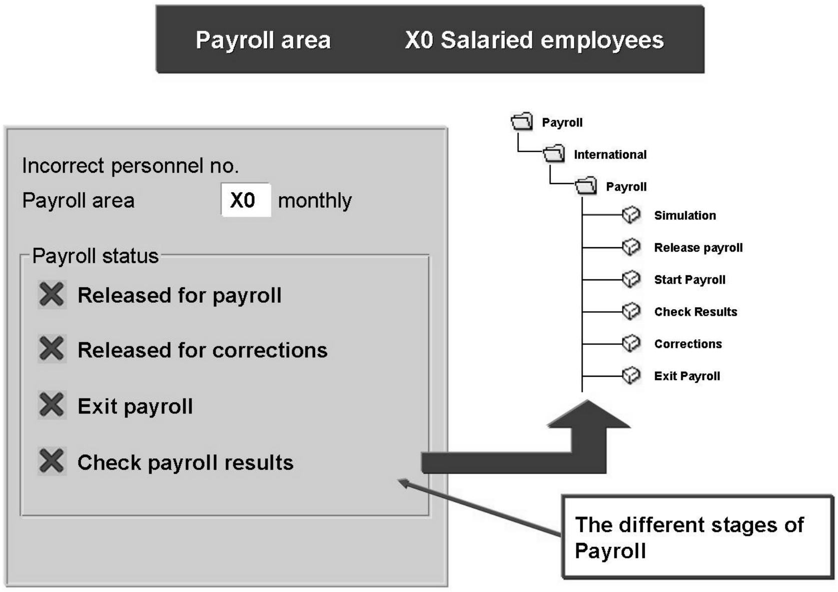


Figure 64: Payroll Control Record

You must create a control record for each payroll area.

The control record controls the individual payroll stages.

The control record:

- Determines the exact date of the current payroll period
- Defines the payroll past for retroactive payroll
- Locks master data and time data during the payroll run to prevent changes from being made. This lock is set for past payrolls and for the current one. You can still change payroll data in the future.
- Defines the earliest retroactive accounting period for the payroll area

The individual payroll stages are in the payroll menu option. You can start, check, correct, and exit payroll from this menu option.

Overview: Payroll Organization

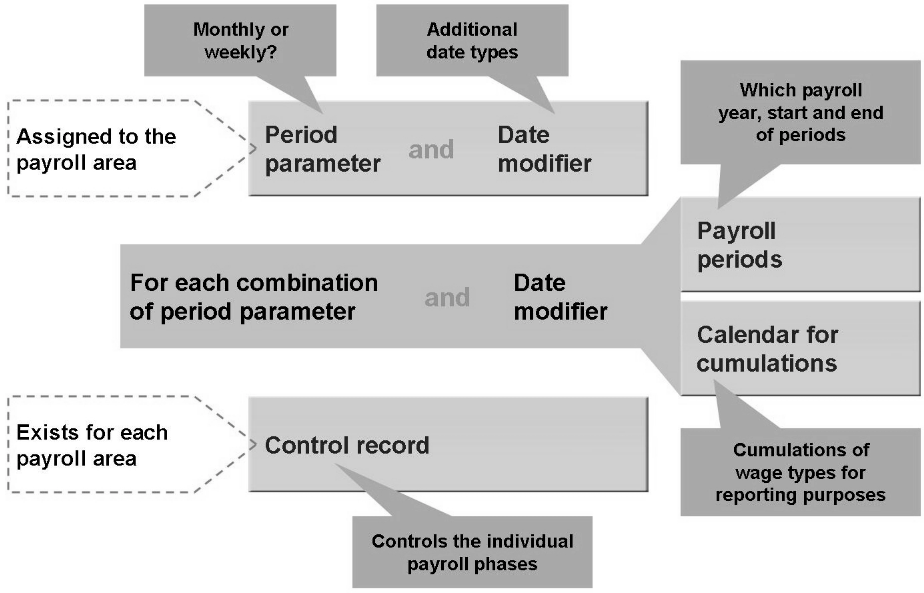


Figure 65: Overview - Payroll Organization

To be able to run payroll in the SAP system, you need to make certain basic Customizing settings:

- Each **payroll area** is assigned a **period parameter** and a **date modifier**. The date modifier is only relevant in some countries. The period parameter specifies whether payroll is run monthly, bimonthly, weekly, or every so many weeks. For this, each period parameter used is assigned to a time unit. The values for the time units are fixed (monthly, bimonthly, weekly, fortnightly, every four weeks, annually).
- You must generate **payroll periods** for each combination of period parameter and date modifier assigned to a payroll area. Depending on the period parameter, all periods in the time interval specified are determined. The system determines the start date and end date of each period and calculates the payday using a rule that is also to be specified as a parameter. Payroll year and payroll period define the specific payroll dates.
- You must create a **control record** for each payroll area. The control record controls the individual stages of payroll.

Set Up Using Customizing

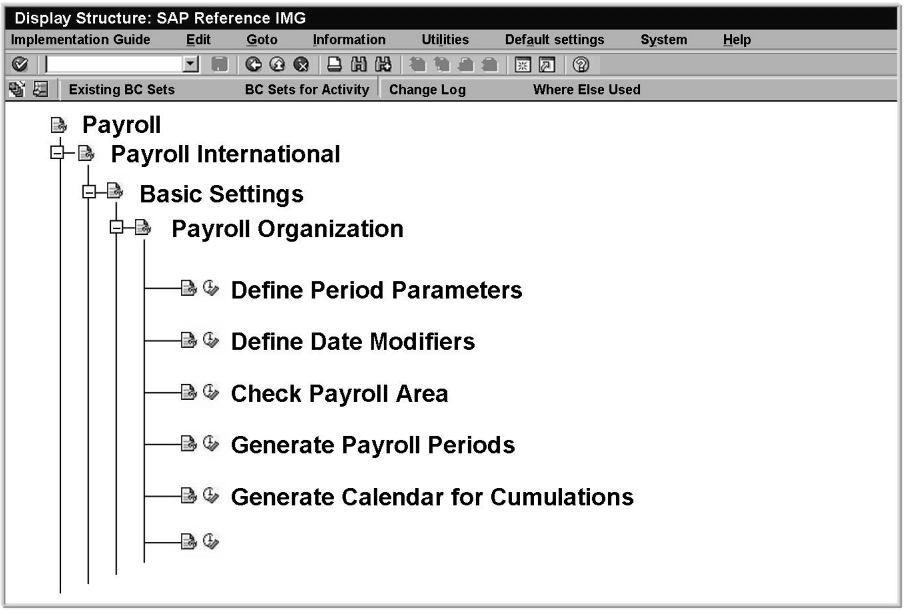


Figure 66: Set Up Using Customizing

The following section explains the administrative elements necessary for payroll such as payroll area, payroll period, payroll control record, and the payroll status of employees. The IMG steps can be found in Customizing Payroll for your appropriate country under *Basic Settings → Payroll Organization*

Payroll Periods

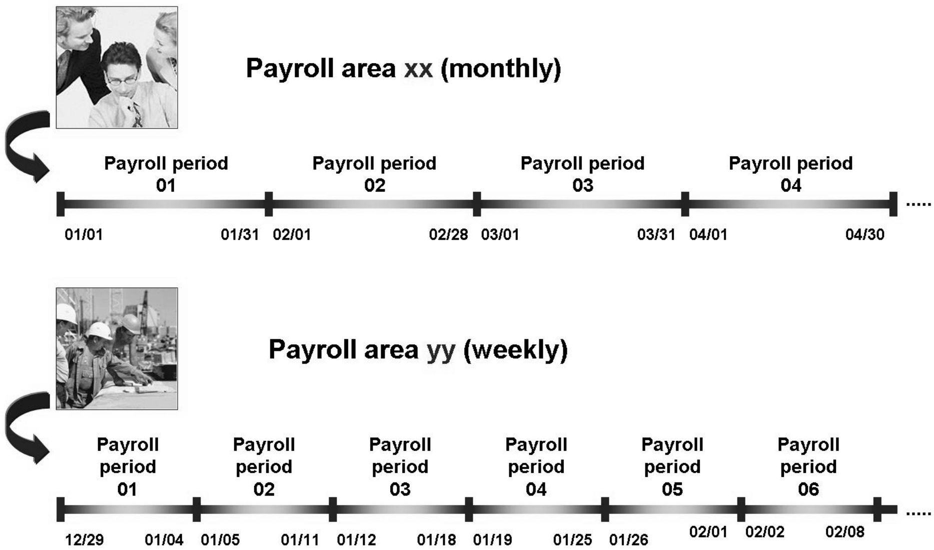


Figure 67: Payroll Periods

A **payroll period** determines the period in which a payroll result is generated. The duration of payroll periods can differ, for example, monthly, weekly, fortnightly.

You must specify for **payroll areas** the start date and end date of the periods to enable the specific payroll dates to be determined.

This data is automatically generated when you start a program. The following slides explain this in more detail.

Generation of Payroll Periods (1)

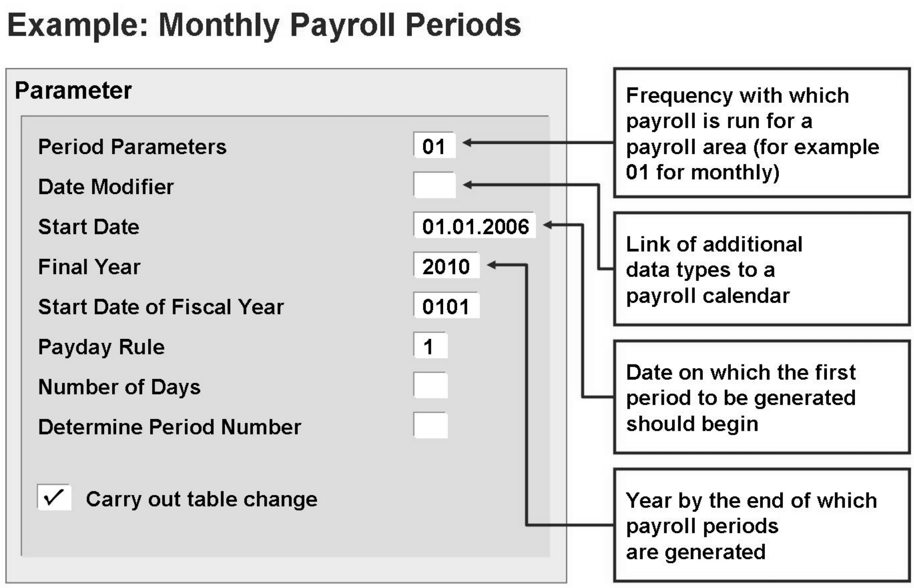


Figure 68: Generation of Payroll Periods (1)

You link payroll periods to time units that are appended to the corresponding period modifier in the IMG activity ***Generate Payroll Periods***. Here, you also specify how paydays are defined. Likewise, you can identify the start of the fiscal year.

In addition to the start date and end date of a period and of the payday, you can define a **date modifier** as an additional payroll-relevant date. This is a modifier you use to link additional date types to a payroll calendar. Besides the date specifications defined for the standard payroll interval, you can generate other date specifications for each period in the payroll calendar. You can use the other date specifications to store the payday, for example.

The example in the graphic shows how you generate payroll periods for a monthly period modifier. Here, the start date and end date of a period coincide with the start date and end date of a calendar month. You use these settings to generate payroll periods for 60 months (start date until end of final year).

Caution: The input screen of the report changes dynamically according to country grouping.

Generation of Payroll Periods (2)

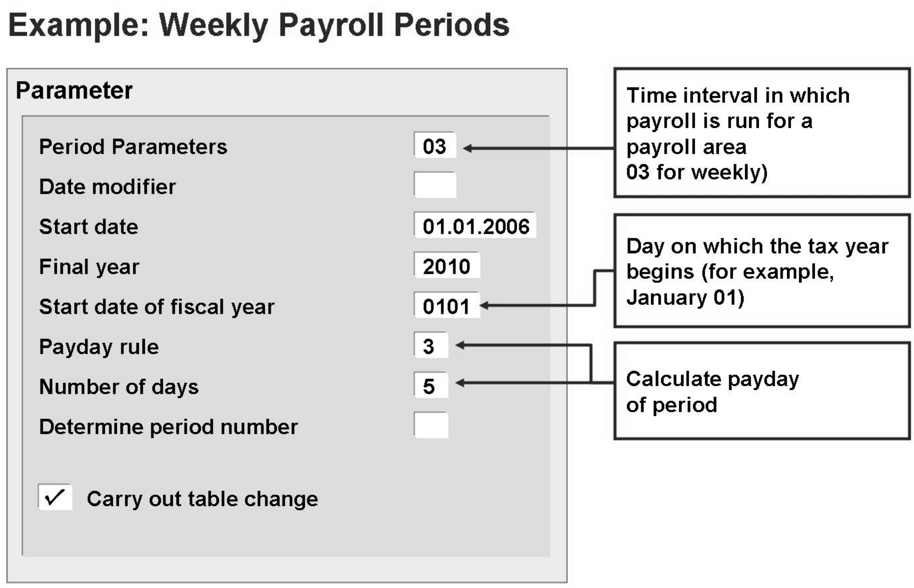


Figure 69: Generation of Payroll Periods (2)

Payday rule/Number of days: These fields determine how the payday of the period is calculated. The following values are possible for the payday rule:

1. The number of days is added to the start date of the period to calculate the payday
2. The number of days is deducted from the end date of the period
3. The number of days is added to the end date of the period
4. Valid for monthly payroll periods only: The number of days is used as the exact date.

Determine period number: In this field, you define the date of the payroll period the system uses to determine the period number. The system uses the period number in the payroll control record to continually project the payroll periods of a year. When counting the period numbers, the system starts again at one at the beginning of each fiscal year.

In the example in the graphic, you pay the employee for the previous week's work every Thursday (start date July 1, 2002: Sunday-Saturday period). The reason for this is that payday rule 3 specifies that the number of days (5) is added to the end date of the period.

Generating Calendar for Cumulations

Generating Calendar for Cumulations

Period	Year	Type	No.	Year
01	2006	M	01	2006
02	2006	M	02	2006
.				
.				
.				
01	2006	Q	01	2006
02	2006	$\boxed{Q}$	01	2006

Cumulation type:

M = monthly
Q = quarterly
X = biannually
Y = annually
U = unlimited

Figure 70: Generating Calendar for Cumulations

Certain countries require the calendar for reporting purposes.

Therefore, in payroll some wage types are cumulated over several periods to obtain, for example, monthly, quarterly, or annual totals. During calendar generation, each payroll period is assigned to a quarter, half year, or year.

You must generate the calendar for each combination of period parameter and date modifier that is assigned at a lower level to a payroll area.

You generate this cumulation calendar for several years in advance using a report in Customizing.

Organizational Key

2) Organizational Keys for Additional Authorization Checks

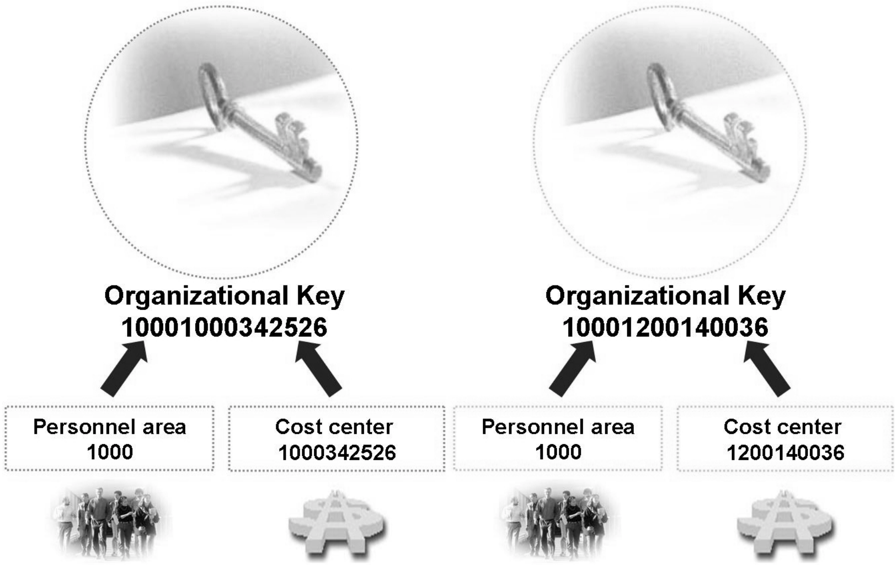


Figure 71: 2) Organizational Keys for Additional Authorization Checks

You can use the organizational key to enhance the authorization checks in conjunction with the HCM master data authorization object (see the course: HR940 Authorizations in HCM).

The organizational key is a 14-character field in the Organizational Assignment infotype (0001) that you can structure according to your own requirements. You can set it up using specific control and rule tables. Do not confuse the organizational key with the organizational unit.

In the IMG, choose *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Set Up Organizational Key.*.

Exercise 8: Payroll Area and Organizational Key

Exercise Objectives

After completing this exercise, you will be able to:

- Create payroll areas and display a payroll control record

Business Example

Since your company has various payroll dates, you should create a payroll area. In addition, you want to find out about the status of a payroll control record.

Task:

Do the following exercises:

1. Create a payroll area for a productive monthly payroll with the key ##. The name should contain your group number.
2. Display the payroll control record for payroll area *50*.

   What is the current period of this payroll area?

   ____

   What is the earliest retroactive accounting period according to the control record?

   ____
3. What IMG path do you follow to define an organizational key?

Solution 8: Payroll Area and Organizational Key

Task:

Do the following exercises:

1. Create a payroll area for a productive monthly payroll with the key ##. The name should contain your group number.

   a) *IMG path: Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Create Payroll Area*

   b) Create a new entry in the table: choose *New Entries*

Payroll area:	##
Payroll area text:	Name containing your group number ##
Period parameters:	01
Deduct:	Active
Date modifier:	Leave empty

2. Display the payroll control record for payroll area *50*.

   What is the current period of this payroll area?

   ____

   What is the earliest retroactive accounting period according to the control record?

   ____

   a) IMG path: *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Create Control Record*

   b) Payroll area: 50

   c) Choose Change or Display

   d) December 2002

   e) until December 2002

3. What IMG path do you follow to define an organizational key?

   a) IMG path: *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Create Organizational Key*

Lesson Summary

You should now be able to:

- Explain the meaning of payroll area and payroll control record
- Name important additional prerequisites for payroll
- Define the structure of the organizational key

Lesson: Administrator Responsible and Employee Attributes

Lesson Overview

The administrators responsible are assigned to certain administrator groups in Customizing and then stored in the Organizational Assignment infotype for the employee.

Additional data is recorded for an employee for statistical reasons.

Lesson Objectives

After completing this lesson, you will be able to:

- Store administrator responsible
- Save statistical information about the employees within a company

Business Example

New administrator groups should be created with new administrators in your company.

You should become acquainted with the options for saving statistical information for your employees.

Administrator Responsible in Personnel Administration

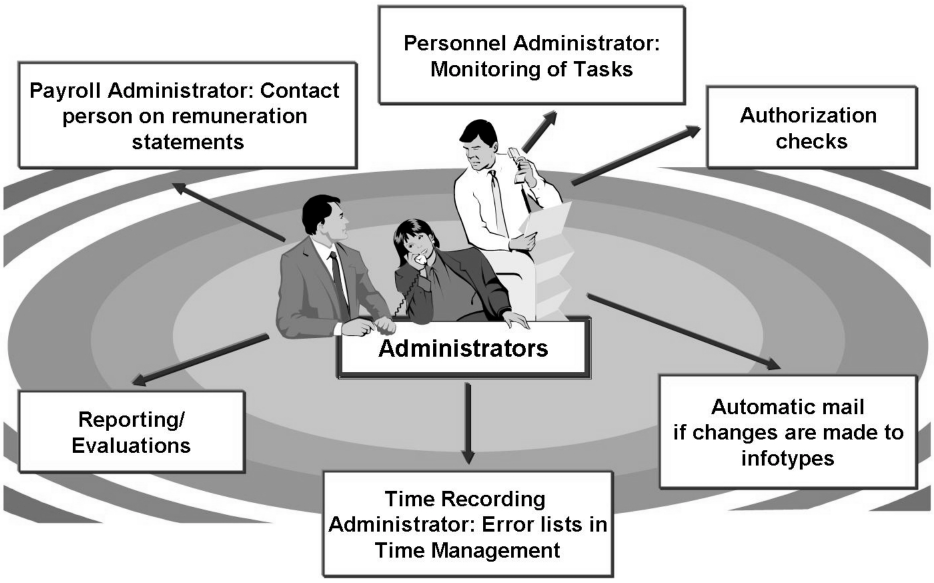
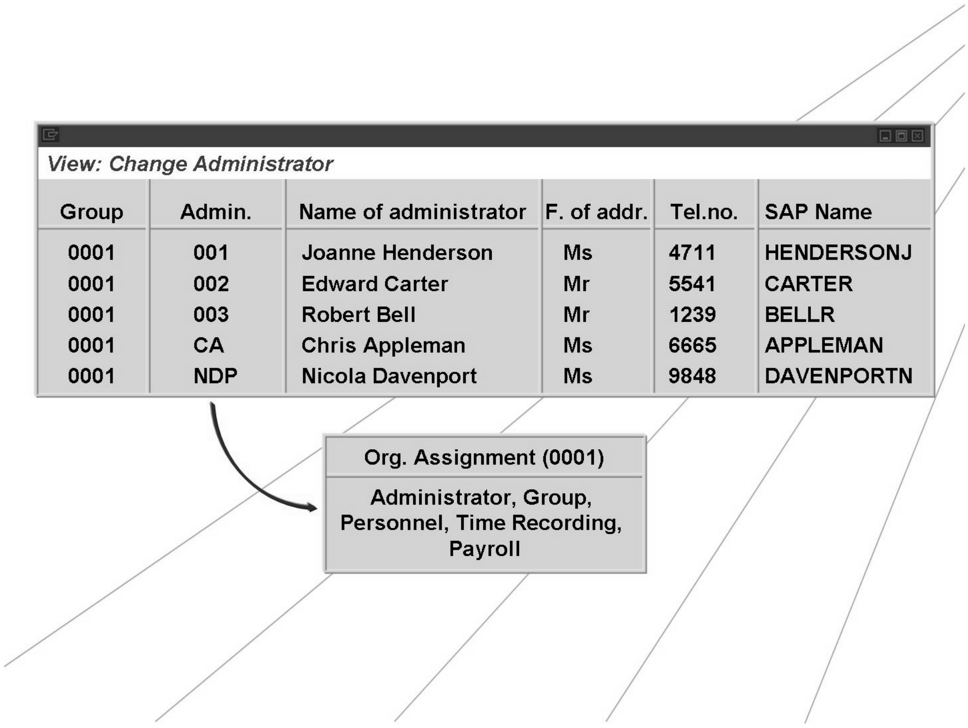


Figure 72: 3) Administrator Responsible for Personnel Administration

In the Organizational Assignment infotype (0001), you can enter three different administrators: personnel administrator, time administrator, and payroll administrator. Examples of use:

- The administrator (in this instance, the "time administrator") can use standard SAP reports as a selection criterion. This would ensure that the time administrator only creates a list of his or her employees.
- You can print the administrator on the remuneration statement so that employees know who to contact in case of queries.

You can call the relevant Customizing step to create administrator groups and administrators under *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Define administrator*. With the call *Define Administrator Groups*, you call the characteristic PINCH that determines the administrator group in the infotype *Organizational Assignment* (see the chapter Define Default Values - Characteristics).



View: Change Administrator

Group	Admin.	Name of administrator	F. of addr.	Tel.no.	SAP Name
0001	001	Joanne Henderson	Ms	4711	HENDERSONJ
0001	002	Edward Carter	Mr	5541	CARTER
0001	003	Robert Bell	Mr	1239	BELLR
0001	CA	Chris Appleman	Ms	6665	APPLEMAN
0001	NDP	Nicola Davenport	Ms	9848	DAVENPORTN

Figure 73: Administrator Assignment

During Customizing, you enter the administrator for each administrator group. These are the administrators that you want to enter in the Organizational Assignment infotype.

The administrator table stores the administrator's name, form of address, and telephone number centrally. In addition, you can enter the SAP names (that is, the administrator's SAP user). You can use this name to trigger an automatic message (e-mail) that is sent to the administrator responsible when users make changes to infotype records.

Employee Attributes

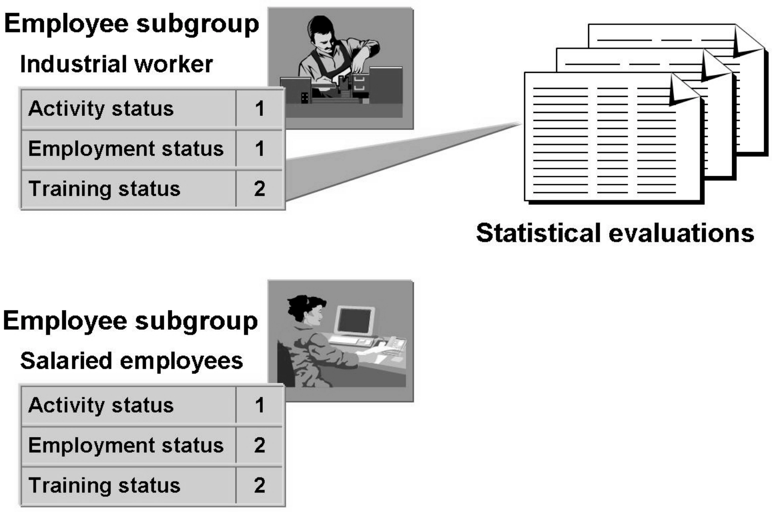


Figure 74: 4) Employee Attributes

You have defined your employee groups and subgroups in your personnel structure. You must now assign a status value to the employee subgroups. This can be an activity status, an employment status, or a training status. In several countries, this information is sent from the State Statistics Office. You store this information in the Customizing step *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Employee Attributes*.

- The possible entries for activity status, are:
  - 1 = Active
  - 2.=Retiree
  - 3 = Early retiree
  - 9 = Other
- Possible entries for the employment status, are:
  - 1 = Industrial worker
  - 2 = Salaried Employee
  - 3 = Clerk
  - 9 = Other
- Possible entries for the employment status, are:
  - 1 = Trainee/apprentice
  - 2 = Trained
  - 9 = Other

The existing values are transferred from the copy template when you copy the employee subgroup using the entity copier.

If necessary, you can specify additional differentiation in the employee statuses of your employees so they are not dependent on the employee subgroup assignments, but are created in the *Terms of Employment* field of the →Organizational Assignment→ infotype. To do so, choose the following in the IMG: *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Define Terms of Employment*.

National and international evaluations use these statuses to select and summarize personal data, or to represent national features.

Exercise 9: Administrator Responsible and Employee Attributes

Exercise Objectives

After completing this exercise, you will be able to:

- Create administrators to assign to your employees

Business Example

The relevant administrator must be informed of employee changes in your company. You are an administrator and must be informed about changes to employee data.

Task 1:

Do the following exercises:

1. Define an administrator for your administrator group (PA##). Use the correct IMG step under *Organizational Assignment:*

   Use your personnel area abbreviation ***PA##*** as the name for your administrator group, and use ***A##*** as the three-character administrator ID. In the *SAP Name* field, enter your logon ID. This ensures that you receive an e-mail if changes are made to the administrator data.
2. Update the master records for the employee who you have already started to hire (personnel number *305992##*):

   Enter the administrator for personnel ***A##*** in the *Organizational Assignment* infotype. Save the data in this infotype and end the hiring action (the other infotypes are processed in the following units).
3. Check the e-mail informing you of a change in your mail inbox. This mail was sent to you as you are entered as the administrator.

Task 2:

The following exercises are OPTIONAL:

1. Call the table for maintaining employee attributes. Which employee characteristics are assigned to your employee subgroup ##? Use the F1 help to find out the meaning of the entries:

   Activity Status: ____

   Employment status ____

   Training status: ____

Continued on next page

Why do values already exist here?

Solution 9: Administrator Responsible and Employee Attributes

Task 1:

Do the following exercises:

1. Define an administrator for your administrator group (PA##). Use the correct IMG step under *Organizational Assignment:*

   Use your personnel area abbreviation ***PA##*** as the name for your administrator group, and use ***A##*** as the three-character administrator ID. In the *SAP Name* field, enter your logon ID. This ensures that you receive an e-mail if changes are made to the administrator data.

   a) IMG path: *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Define administrator*

   b) Select *New Entries*.

   c) Enter the group ***PA##***, administrator ***A##***, administrator's name: ***Admin.group ##***, a form of address and telephone number of your choice, and your SAP name ***HR305-##***.

   d) Save your data and return to the IMG.

2. Update the master records for the employee who you have already started to hire (personnel number *305992##*):

Continued on next page

Enter the administrator for personnel ***A##*** in the *Organizational Assignment* infotype. Save the data in this infotype and end the hiring action (the other infotypes are processed in the following units).

a) *Human Resources→ Personnel Management → Administration → HR Master Data*

b) Select *Personnel Actions*.

c) Enter the personnel number *305992##.*

d) Select *Hiring HR305*.

e) Choose *Execute*.

f) Choose *Execute infogroup* to restart the hiring action.

g) Select *Next record* until you get to the *Change Organizational Assignment (infotype 0001)* screen.

h) Enter ***A##*** in the PersAdmin field.

i) Save the data and leave the hiring personnel action by choosing *Exit* or *Cancel*.

j) Return to the SAP Easy Access menu.

3. Check the e-mail informing you of a change in your mail inbox. This mail was sent to you as you are entered as the administrator.

   a) *Office → Work place → Inbox*

   b) Select *Unread Documents*.

   c) Check the document *Change to Personnel Administrator for ...*

   d) “Personnel administrator PA## A## is responsible for employee 305992## from DD.MM.YYYY. Previously this was the responsibility of the personnel administrator ....”

   e) Return to the SAP Easy Access menu.

Task 2:

The following exercises are OPTIONAL:

1. Call the table for maintaining employee attributes. Which employee characteristics are assigned to your employee subgroup ##? Use the F1 help to find out the meaning of the entries:

   Activity Status: ____

   Employment status ____

   Training status: ____

Continued on next page

Why do values already exist here?

____

____

a) IMG path: *Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Define Employee Attributes*

b) Activity status 1 = Active

c) Employment status 1 = Industrial worker

d) Training status 2 = Trained

e) Why do values already exist here?

f) The values are also transferred when the entity copier copies the employee subgroup.

Lesson Summary

You should now be able to:

- Store administrator responsible
- Save statistical information about the employees within a company

Unit Summary

You should now be able to:

- Explain the meaning of payroll area and payroll control record
- Name important additional prerequisites for payroll
- Define the structure of the organizational key
- Store administrator responsible
- Save statistical information about the employees within a company

Unit 7

Defining Default Values – Features

Unit Overview

To begin with, the meaning and functions of the features are discussed. Exercises are then solved using examples whereby the ABKRS, PINCH and NUMKR features have to be changed.

Unit Objectives

After completing this unit, you will be able to:

- Control the default values using features in the system.

Unit Contents

Lesson: Defining Default Values – Features

Lesson Overview

Function and Advantages of Features

Maintaining features, which define default values for:

1. Payroll area
2. Administrator group
3. Number range intervals

Lesson Objectives

After completing this lesson, you will be able to:

- Control the default values using features in the system.

Business Example

Tp prevent personnel administrators having to enter all the master data manually, you can define default values that are then automatically proposed by the system.

Default Values

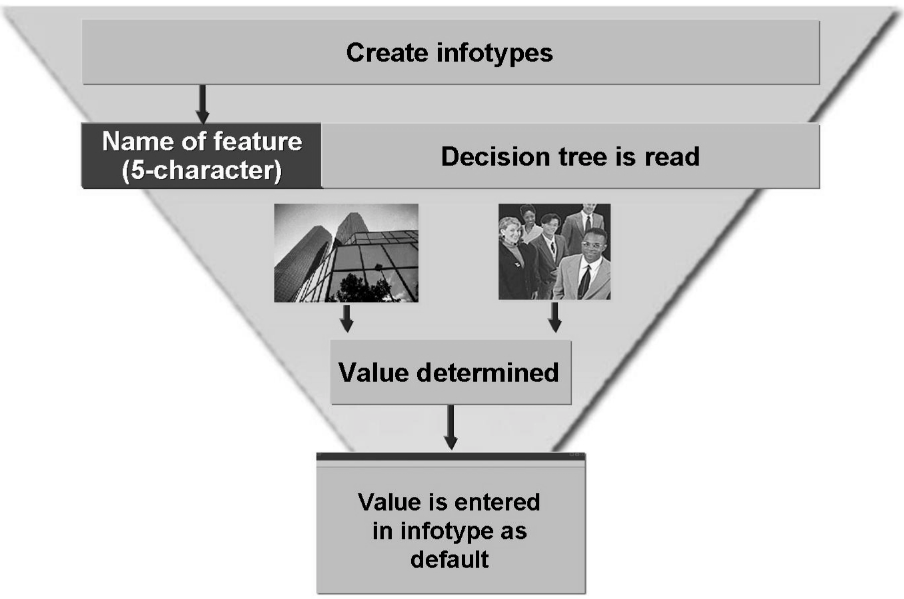


Figure 75: Default Values

The system often uses features to determine default values. The system suggests these values when you maintain infotypes that affect employee master data.

For example, the ABKRS feature determines default values for the payroll area. It does this using the data found in the employee's Organizational Assignment infotype record. Another example is the LGMST feature. This feature defaults the wage types permitted for an employee in the Basic Pay infotype. This feature is discussed in the unit on the wage type structure.

Maintaining Features

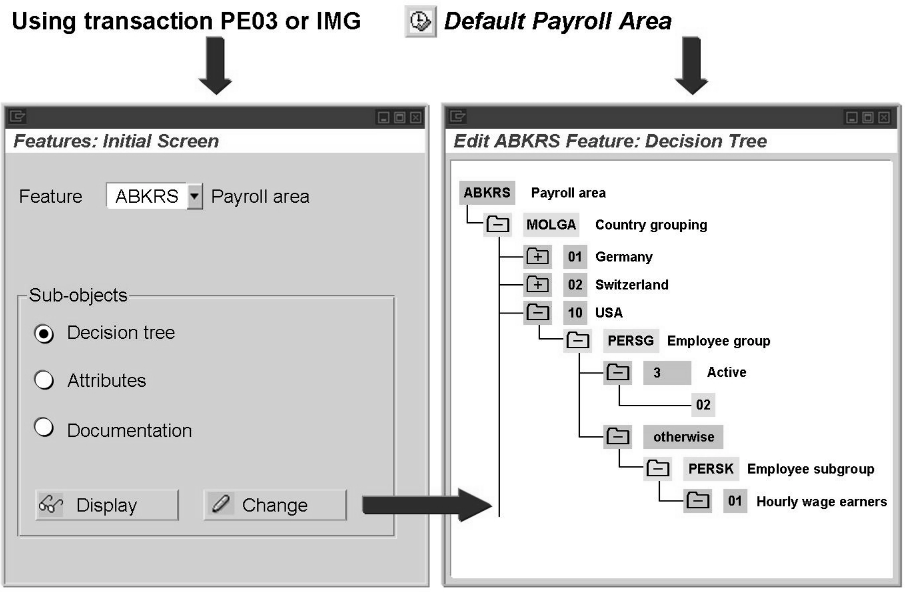


Figure 76: Maintaining Features (1)

There are two ways to maintain features:

- You can access the feature decision tree from the Payroll or Time Management IMG (implementation guide) and then make your changes. The system always displays the feature assigned to the IMG module.
- You can also use the feature maintenance transaction, PE03. The "Features: Initial Screen" appears.

Decision trees can be simple or very complex. This depends on their function and on the number of fields, operations, and decision criteria they contain.

Report RPUMKG00 activates features.

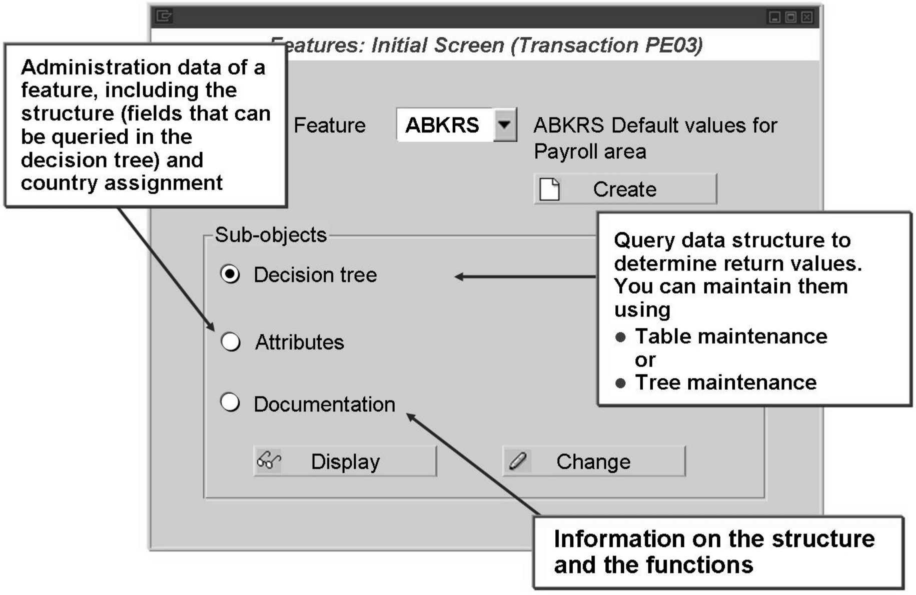


Figure 77: Maintaining Features (2)

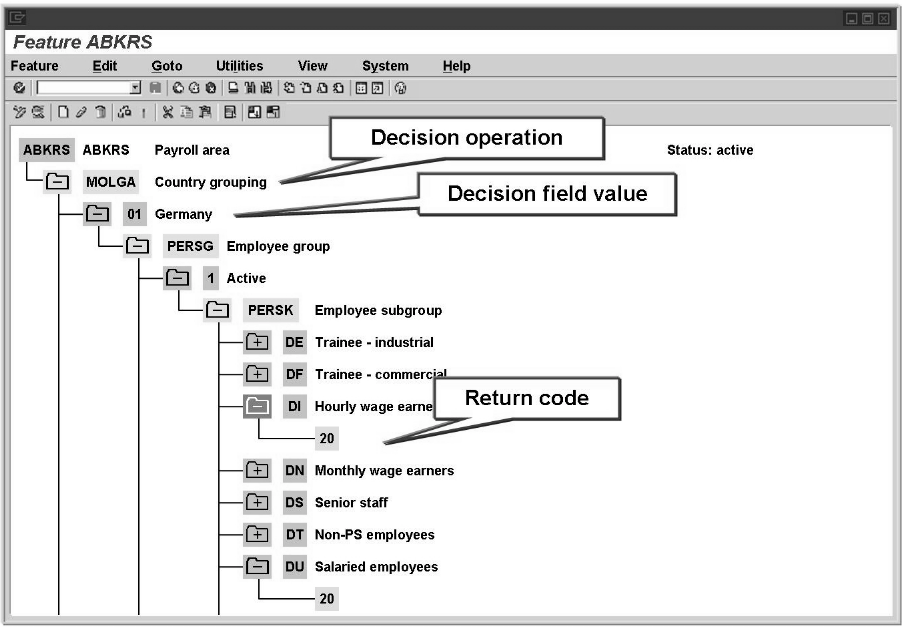


Figure 78: Maintaining Features (3)

Features are objects that query different personnel or data structure fields to determine a certain return code or result. The system uses this value to define defaults and to control certain system processes. Features can therefore enhance system flexibility.

You can use features for different purposes. The most important applications are:

- Features that define default values

  The system often uses features to determine default values. The system suggests these values when you maintain infotypes that affect employee master data. The feature either delivers a default value directly - this is then written to the relevant infotype field (for example, the ABKRS feature -> Organizational Assignment (infotype 0001)), or the feature delivers a key entry as a return code, which the system can use to read one or more tables. The system takes the stored default values from these tables and enters them in the relevant infotype, for example, Feature LGMST -> Basic Pay (infotype 0008).

  Hint: The system always reads these default values when you create an infotype.

- Features that control system processes

  The feature Pnnnn (nnnn stands for the infotype number) controls the sequence in which the system displays country-specific screens when you maintain or display master data infotypes.

- Features that automatically generate mail messages

  Some features automatically generate mail messages when you change certain master data fields, for example, the various administrators in infotype Organizational Assignment (0001). Example: feature M0001.

Feature ABKRS

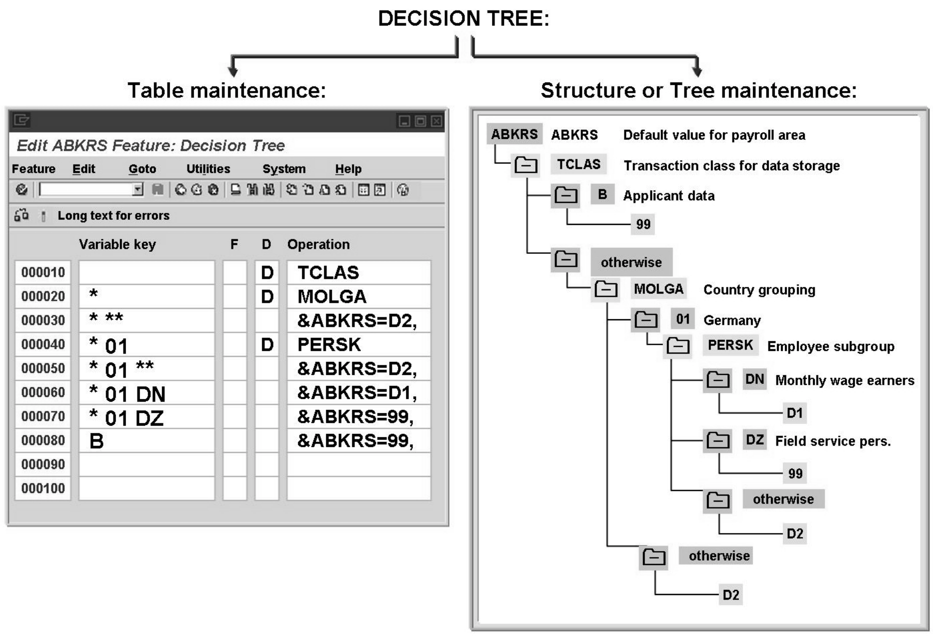


Figure 79: 1) Default for Payroll Area

Here, you can define default values for payroll areas for your employees. The system defaults the payroll area when you maintain the master data in the Organizational Assignment infotype (0001).

In the standard SAP system, the payroll area depends on the country grouping, the employee group, and the employee subgroup. The system stores this data combination as a feature. This feature depicts a rule in a decision tree.

The system arranges the decision rule in the feature according to the following organizational data:

- Transaction class for data storage (TCLAS)

  A = Administration

  B = Recruitment
- Country grouping (MOLGA)
- Employee subgroup (PERSK)

For example, the feature would suggest payroll area 99 for employee subgroup DZ. This applies to the country grouping 01 (Germany). The system suggests this value as a default value in infotype 0001.

The value assignment in the table view appears as &Feature=Return code.

Feature PINCH

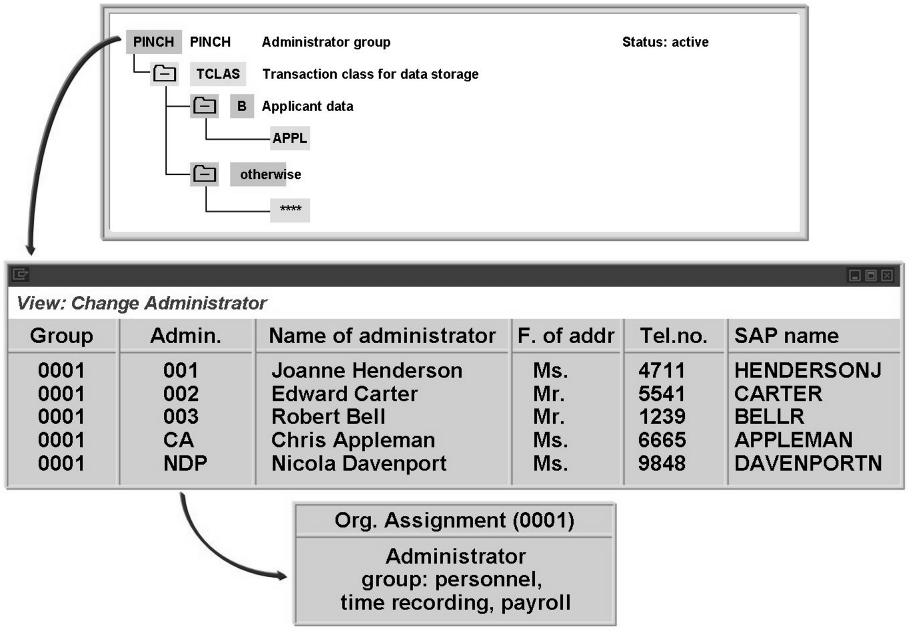


Figure 80: 2) Default for Administrator Groups

The PINCH feature determines an administrator group that is stored in the *Organizational Assignment* infotype.

You can assign administrators to an administrator group as follows:

- Store the return code of the feature in the Group field.
- Assign a three-character ID to each administrator.
- Determine your administrator's name, form of address, telephone number and user name (mail system).

If the return value of the PINCH feature is four asterisks (****), the system uses the name of the personnel area to which the employee is assigned in the "Organizational Assignment infotype (0001)" as the name of the administrator group.

You can select the administrators stored in the system that belong to the default administrator group. To do so, choose the F4 help in the relevant field in the Organizational Assignment infotype.

Feature NUMKR

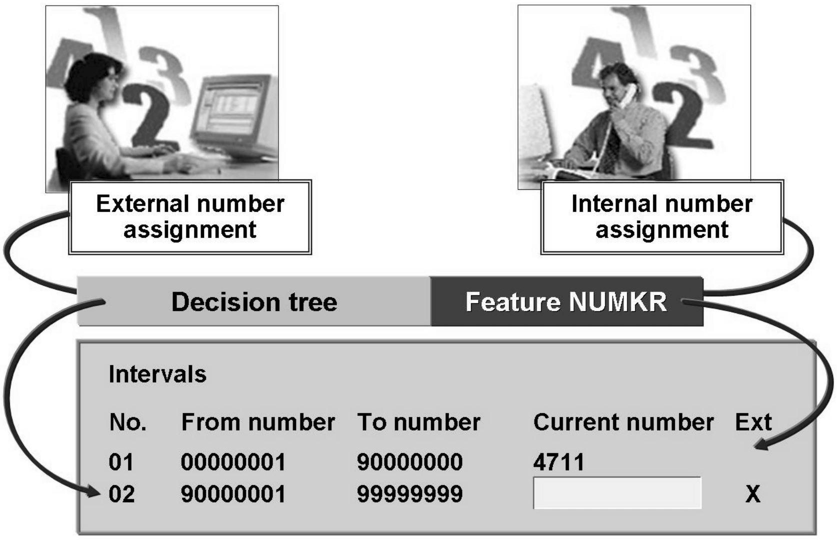


Figure 81: 3) Default for Number Range Intervals

You can also use a feature (NUMKR) to assign personnel numbers. This is also based on the organizational assignment.

There are two ways to assign a number range:

- Internal number assignment: In this instance, the SAP system assigns the personnel numbers.
- External number assignment: In this instance, the user assigns the personnel numbers.

SAP recommends that you use the internal number assignment function. Matchcodes can use any criteria to search HR master records, and for this reason you do not need “meaningful” personnel numbers. This is also advantageous when you transfer or promote employees as it means that any “meaning” you may have assigned to a personnel number cannot be lost.

You can have several number range intervals.

Exercise 10: Defining Default Values – Features

Exercise Objectives

After completing this exercise, you will be able to:

- Reduce data entry in master data by using features to define default values

Business Example

Previously, an administrator group for each personnel area was sufficient. However, your company is now growing so quickly that you need different administrator groups for individual employee subareas.

Task 1:

1. Return to IMG step *Define Administrator*, and copy the entry you made in the last exercise (with administrator group PA##). Use this entry to create an administrator group with the identification SG##.

Task 2:

In the IMG, find the step *Define Administrator Groups*, in which you will find the PINCH feature.

Open the "otherwise transaction class" and the query for personnel area.

1. First consider, using the **logic for personnel area PA31**, which entries you would have to make to achieve the following:

   If an employee works in production, administrator group SG31 should be defaulted. For all other employees, administrator group PA31 should be defaulted.

   What entries do you have to make?

   Then compare your solution with the solution that is already defined in your personnel area PA##.

2. Also create the solution you found for your own personnel area PA## for personnel area PA31.

   Check the feature tree for errors.

   Save but do NOT activate the feature yet.

Continued on next page

Task 3:

Call the *Organizational Assignment infotype* (0001) again for your employee within the HR305 hiring action. Make a note of the default values:

1. Defaulted administrator group: __________
   Personnel administrator: __________
   Save the infotype and end the hiring action.

Task 4:

1. What is the central transaction for calling feature maintenance?

Task 5:

1. What is the feature that defaults the payroll area in infotype 1 called?

2. What is the feature called that defaults the number range for the personnel number assignment?

Solution 10: Defining Default Values – Features

Task 1:

1. Return to IMG step *Define Administrator*, and copy the entry you made in the last exercise (with administrator group PA##). Use this entry to create an administrator group with the identification SG##.

   Answer: *IMG path: Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Determine Administrator*

   Select the entry with administrator group “PA##”, administrator “A##”, and your SAP user name “HR305-##”.

   Choose *Copy as*. Overwrite the group “PA##” with “SG##”, and then choose *Copy* and *Save*.

   Save your data and return to the IMG.

Task 2:

In the IMG, find the step *Define Administrator Groups*, in which you will find the PINCH feature.

Open the “otherwise transaction class” and the query for personnel area.

1. First consider, using the **logic for personnel area PA31**, which entries you would have to make to achieve the following:

   If an employee works in production, administrator group SG31 should be defaulted. For all other employees, administrator group PA31 should be defaulted.

   What entries do you have to make?

   Then compare your solution with the solution that is already defined in your personnel area PA##.

   Answer: *IMG: Personnel Management → Personnel Administration → Organizational Data → Organizational Assignment → Determine Administrator Groups*

   - A new query after the personnel subarea
   - If the personnel subarea = 0004, the return value should be SG31
   - Otherwise, the return value should be “PA31” or “****”.
2. Also create the solution you found for your own personnel area PA## for personnel area PA31.

Continued on next page

Check the feature tree for errors.

Save but do NOT activate the feature yet.

a) To change the “PINCH” feature, proceed as follows:

b) Search for personnel area (WERKS) PA31 under transaction class (TCLAS) “otherwise”.

c) Position your cursor on *PA31* on the return value “****”, and choose *Delete*. Confirm the *Delete node/sub-tree* dialog box by choosing “Yes”.

d) Position the cursor on the *PA31* node and select the function *Create nodes*. The *Otherwise: Choose node type for new nodes* dialog box appears. Set the *Field for decision operation* indicator and confirm by choosing Enter.

e) In the *Field selection for decision operation* dialog box, select the *BTRTL Personnel subarea* field, and confirm with *Transfer*.

f) Position your cursor on the newly created *BTRTL* node and perform the *Create* function.

g) The *Personnel subarea* dialog box appears. Here, select *Personnel subarea 0004 in personnel area PA31*, and confirm with *Enter*.

h) Position your cursor on the *0004* node and choose *Create*. In the subsequent dialog box that appears, confirm the *Return value* default setting with *Enter*.

i) The system displays the *Return value for field value 0004* dialog box. Here, enter the value “SG31”, and choose *Transfer*.

j) Position your cursor on the *otherwise* node and choose *Create*. In the subsequent dialog box that appears, confirm the *Return value* default setting with *Enter*.

k) The system displays the *Return value for field value otherwise* dialog box. Here, enter the value “****”, and choose *Transfer*. This ensures that administrator group PA31 is the default for all other personnel subareas of personnel area PA31.

l) After you have changed the “PINCH” feature, choose the *Check* feature function. The system should display the message “Decision tree is error-free”.

m) **Save but do NOT activate the feature yet.**

Continued on next page

Task 3:

Call the *Organizational Assignment infotype* (0001) again for your employee within the HR305 hiring action. Make a note of the default values:

1. Defaulted administrator group: __________

   Personnel administrator: __________

   Save the infotype and end the hiring action.

   Answer: SG##

   A##

   Proceed as follows:

   Human Resources→ Personnel Management → Administration → HR Master Data

   Choose *Personnel Actions*. Enter the personnel number “305992##”.

   Select the *Hiring HR305* personnel action.

   Choose *Execute*.

   Choose Execute *infogroup* to restart the hiring action.

   Choose *Next record* until you reach the *Organizational Assignment* infotype (0001).

   Use the possible entries function for the *Personnel*, *Time Recording*, and *Payroll* administrator fields.

   Save the infotype and end the hiring action.

   Choose *Save* and leave the hiring personnel action by selecting *Exit*.

   Return to the SAP Easy Access menu.

Task 4:

1. What is the central transaction for calling feature maintenance?

   Answer: *PE03*

Task 5:

1. What is the feature that defaults the payroll area in infotype 1 called?

   Answer: *ABKRS*

2. What is the feature called that defaults the number range for the personnel number assignment?

   Answer: *NUMKR*

Lesson Summary

You should now be able to:

- Control the default values using features in the system.

Unit Summary

You should now be able to:

- Control the default values using features in the system.

Unit 8

Personal Data

Unit Overview

The Personal Data, Addresses, and Bank Details infotypes are discussed in this section. This occurs within the context of a hiring action, whereby the most important Customizing settings are also discussed.

Unit Objectives

After completing this unit, you will be able to:

- Review personal data of an employee.

Unit Contents

Lesson: Personal Data

Lesson Overview

Infotypes

1. Personal Data
2. Addresses
3. Bank Details

Lesson Objectives

After completing this lesson, you will be able to:

- Review personal data of an employee.

Business Example

An employee's personal data is stored in pre-defined infotypes.

Company-specific modifications may also be necessary in Customizing.

Personal Data

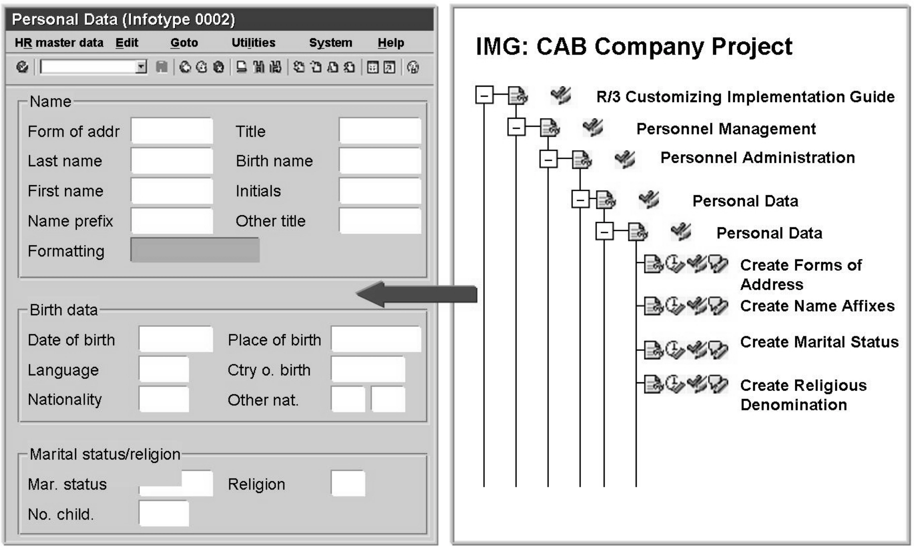


Figure 82: 1) Personal Data

In the first data group, enter all the data regarding the employee's name. This includes the form of address, the last and first name, any second names or birth names, as well as the title, and the initials. You should also enter details of any academic titles, prefixes, and affixes that the employee may have.

Birth data:
This data group consists of the employee's date and place of birth, as well as the nationality and language.

Marital status/religion:
The third data group contains data such as the number of children, the employee's marital status, and in some countries, the employee's religion.

You do not have to enter the employee's family members into the system, therefore, the system does not check to see that the number of children entered in the Personal Data infotype is the same as the actual number entered in the Family infotype (0021).

Addresses

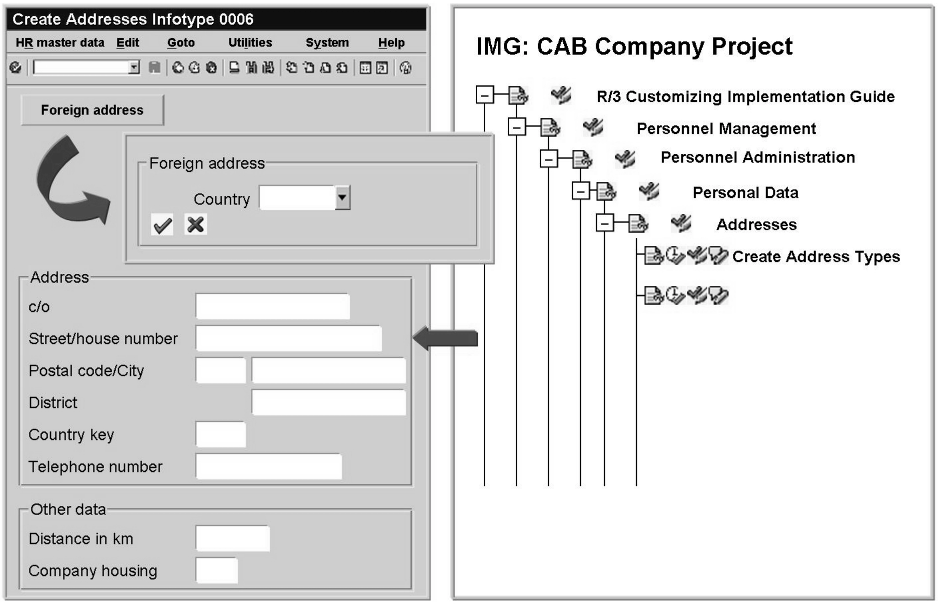


Figure 83: 2) Addresses

Foreign addresses:
The different country versions have their own entry screens for the Addresses infotype (0006). When you create an address, the system chooses the country entry screen that corresponds to the country of the personnel area to which the employee is assigned in the Organizational Assignment infotype (0001).

If you want to use a different country screen to the one suggested by the system, use the *Foreign address* function to choose a different screen. You can find this function on the entry screen for the Addresses infotype.

Bank Details

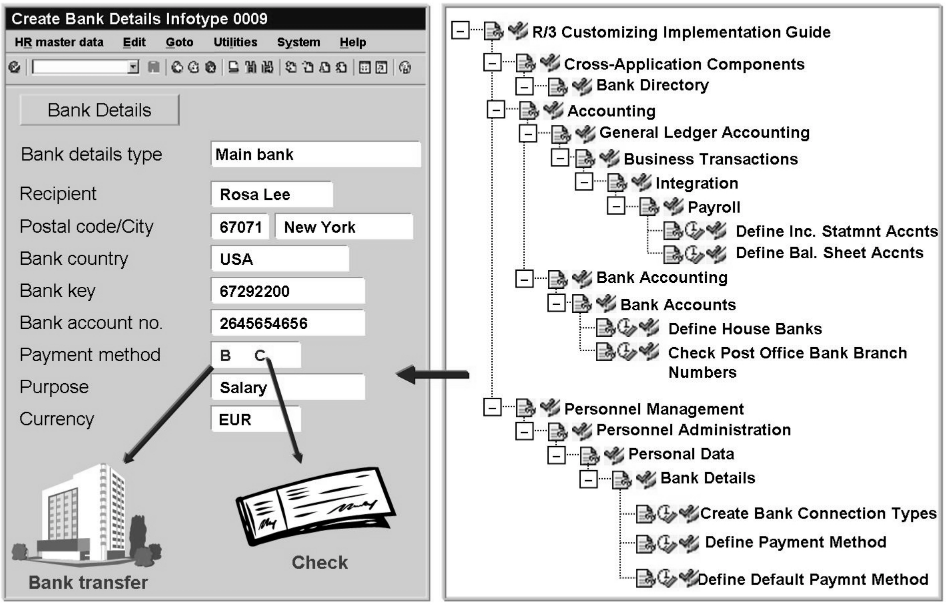


Figure 84: 3) Bank Details

Exercise 11: Personal Data

Exercise Objectives

After completing this exercise, you will be able to:

- Maintain personal data of your employee

Business Example

Efficient personnel administration requires a range of maintainable employee personal data. You have already checked your Customizing settings and now want to update the data for your new employee accordingly.

Task 1:

1. Return to the *Hiring HR305* action and fill the *Personal Data* (0002), *Addresses* (0006) and *Bank Details* (0009) infotypes for employee 305992## (## = group number) with entries of your choice.

   Hint: *If you enter details on a spouse, or children, a dynamic action in the system may require additional data. In this case, make the relevant entries, save the data in the infotypes, and continue with the hiring action.*

   After you have maintained and saved the entries in these infotypes, STOP the hiring personnel action by selecting "Exit".

Task 2:

1. Use your project IMG to answer the following question:

   What is the IMG path for modifying the marital status?

   ____

   ____

Continued on next page

Task 3:

The following exercise is optional:

1. Your employee with personnel number 305992## will change his or her permanent residence as of the first day of next month.

Task 4:

The following exercise is optional:

1. You have made a typing error in the Street field for your employee with personnel number 305991##, and want to correct it.

Solution 11: Personal Data

Task 1:

1. Return to the *Hiring HR305* action and fill the *Personal Data* (0002), *Addresses* (0006) and *Bank Details* (0009) infotypes for employee 305992## (## = group number) with entries of your choice.

   Hint: *If you enter details on a spouse, or children, a dynamic action in the system may require additional data. In this case, make the relevant entries, save the data in the infotypes, and continue with the hiring action.*

   After you have maintained and saved the entries in these infotypes, STOP the hiring personnel action by selecting "Exit".

   a) *Human Resources → Personnel Management → Administration → HR Master Data*

   b) Select *Personnel Actions*.

   c) Enter the personnel number *305992##*.

   d) Select the *Hiring HR305* personnel action. Choose *Execute*.

   e) Choose *Execute infogroup* to restart the hiring action.

   f) Choose *Next record* until you reach the *Create Personal Data (Infotype 0002)* screen.

   g) Make entries of your choice in the required fields and save your data.

   h) Choose *Next record* until you reach the *Create Addresses (infotype 0006)* screen.

   i) Make entries of your choice in the required fields and save your data.

   j) Choose *Next record* until you reach the *Create Bank Details (infotype 0006)* screen.

   k) Make entries of your choice in the required fields and save your data.

   l) Choose *Exit* and return to the SAP Easy Access menu.

Task 2:

1. Use your project IMG to answer the following question:

Continued on next page

What is the IMG path for modifying the marital status?

____

____

a) *IMG: Personnel Management → Personnel Administration → Personal Data → Personal Data → Create Marital Status*

Task 3:

The following exercise is optional:

1. Your employee with personnel number 305992## will change his or her permanent residence as of the first day of next month.

   a) Call personnel master data maintenance using the SAP Easy Access menu:

   b) *Human Resources → Personnel Management → Administration → Maintain HR Master Data*

   c) Select the Addresses infotype and then choose *New* or *Copy*

   d) *→ A history is created*

Task 4:

The following exercise is optional:

1. You have made a typing error in the Street field for your employee with personnel number 305991##, and want to correct it.

   a) Call personnel master data maintenance using the SAP Easy Access menu:

   b) *Human Resources → Personnel Management → Administration → Maintain HR Master Data*

   c) Select the Addresses infotype and choose *Change*

   d) *→ No history is created*

Lesson Summary

You should now be able to:

- Review personal data of an employee.

Unit Summary

You should now be able to:

- Review personal data of an employee.

Unit 9

Links Between Planned Working Time and Basic Pay

Unit Overview

The Planned Working Time and Basic Pay infotypes and how they are linked is discussed in this section. Data inheritance is discussed within the context of the hiring action.

Unit Objectives

After completing this unit, you will be able to:

- Describe how the working time stored in the Planned Working Time infotype (0007) is related to the payroll-relevant data stored in the Basic Pay infotype (0008).
- Explain the relevance of this information for payroll

Unit Contents

Lesson: Links Between Planned Working Time and Basic Pay

Lesson Overview

Contents:

- Infotype 0007: Planned Working Time
- Relationship between the Planned Working Time and Basic Pay infotypes
- Consequences for Payroll

Lesson Objectives

After completing this lesson, you will be able to:

- Describe how the working time stored in the Planned Working Time infotype (0007) is related to the payroll-relevant data stored in the Basic Pay infotype (0008).
- Explain the relevance of this information for payroll

Business Example

The employees in your company have specific working times. Attendances and absences can be calculated using these as a basis.

Working times also play an important role in an employee's pay. Here we make the distinction between payment on an hourly basis, and payment for a specified period (for example, a month).

Employee Working Time

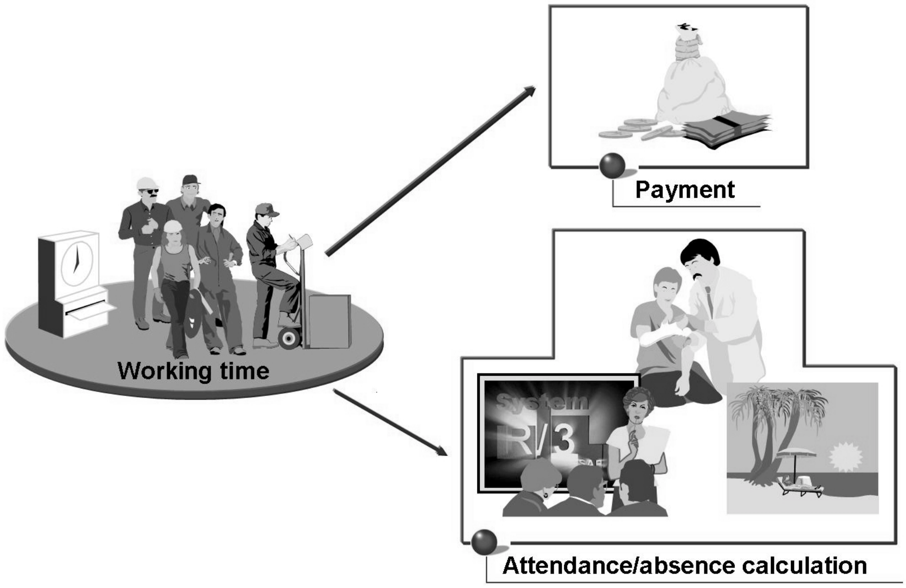


Figure 85: Employee Working Time

You assign each employee to a work schedule. The working time stored for this work schedule is important for the employee's pay, as well as for counting attendances and absences.

In the first step, record the working time information in the Planned Working Time and Basic Pay infotypes.

In the second step, attendance/absence calculation and payroll accesses this information.

Planned Working Time

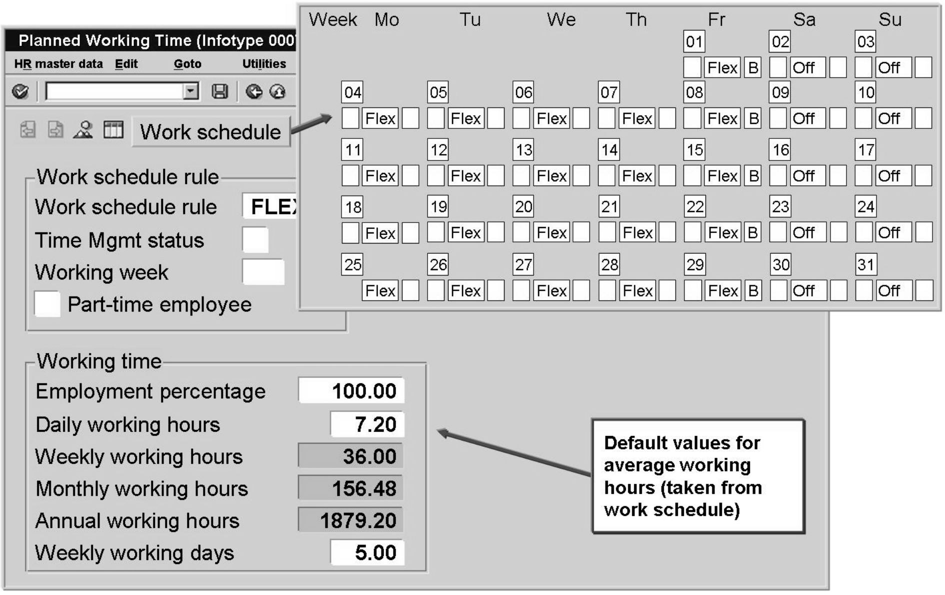


Figure 86: Planned Working Time

The system stores an employee's working time as a work schedule rule in the Planned Working Time infotype (0007). The system also stores the average working hours here. The Monthly working hours field contains the total planned working time for the current month.

Links Between Planned Working Time and Basic Pay

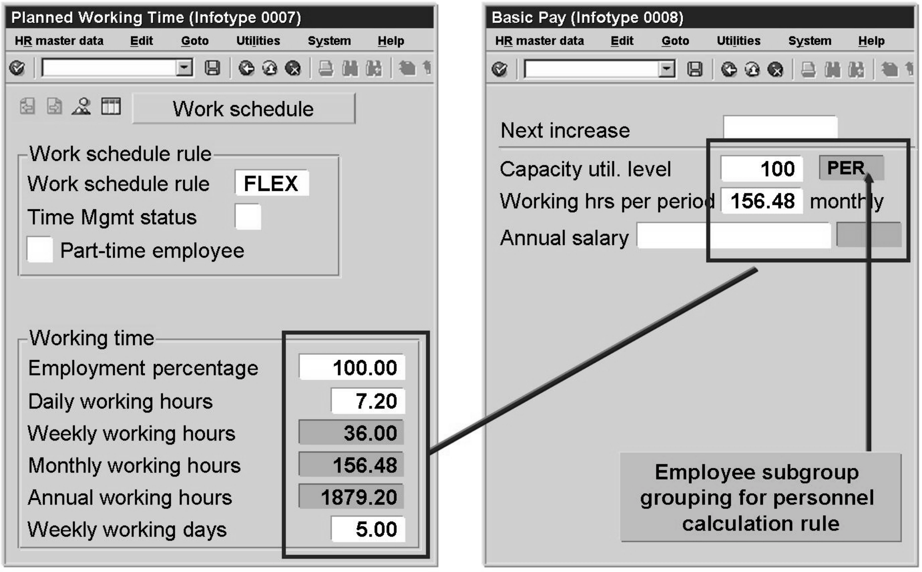


Figure 87: Links Between Planned Working Time and Basic Pay

The system takes the employment percentage and the average number of working hours from infotype 0007 and suggests them as default values for the capacity utilization level and the working hours per period in infotype 0008.

Employee Subgroup Grouping for Personnel Calculation Rule

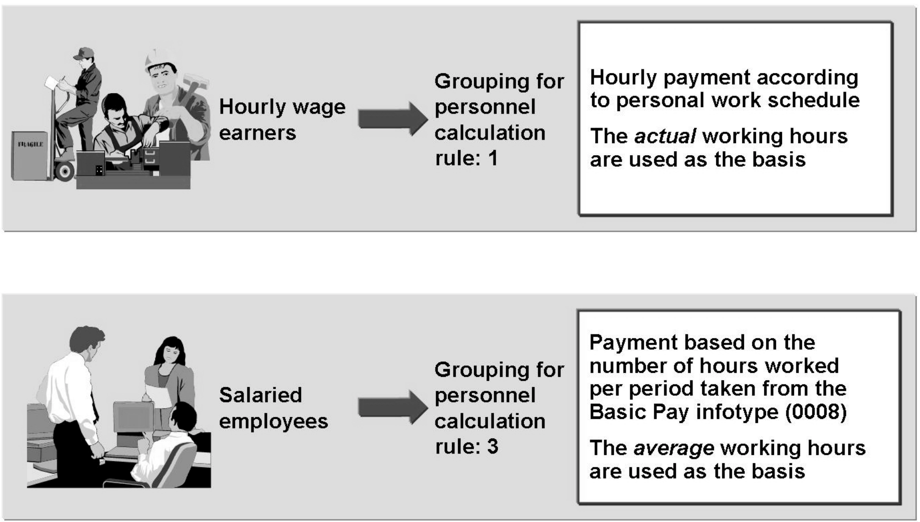


Figure 88: Employee Subgroup Grouping for Personnel Calculation Rule

The distinction is made between employees that are paid on an hourly basis and employees whose pay is based on the number of hours they work per period (for example, salaried).

To realize this difference in the system, you can set up employee subgroup groupings for personnel calculation rules and as a result, the system treats employees differently in payroll. The meaning of the groupings is fixed and cannot be deleted (for example, hourly wage earners: 1, salaried employees: 3).

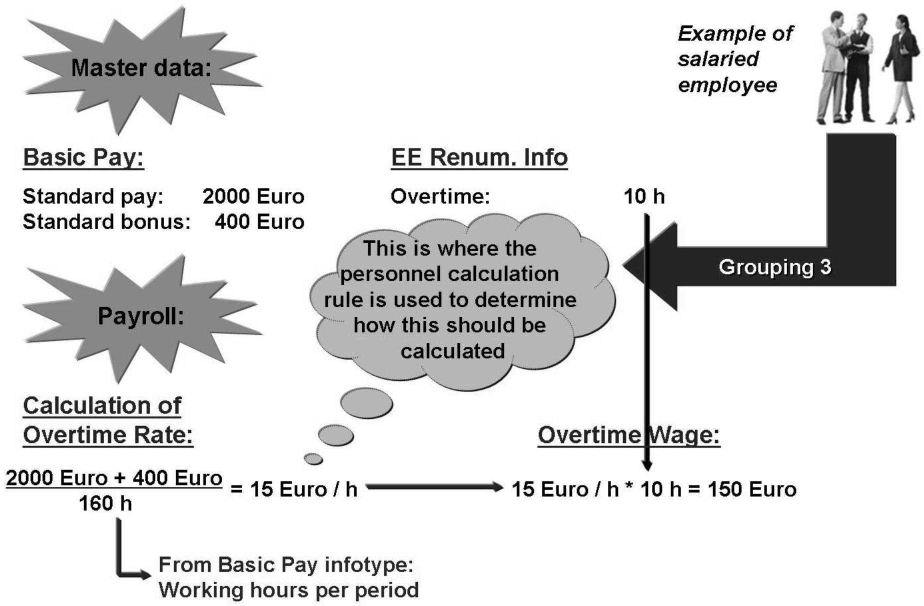


Figure 89: Calculation Example 1: Calculating Overtime Rate for a Salaried Employee

This is an example of how a personnel calculation rule works for a salaried employee.

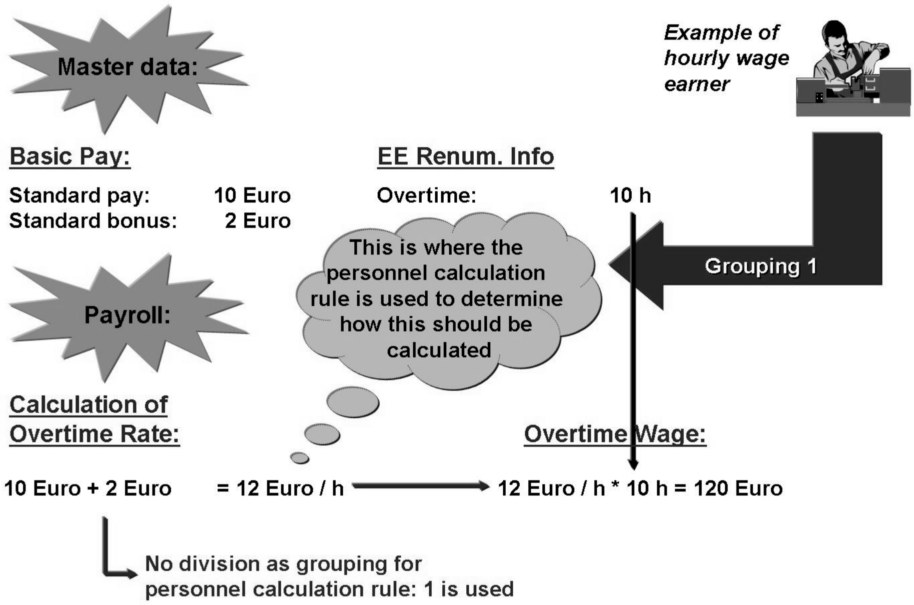


Figure 90: Calculation Example 2: Calculating Overtime Rate for an Hourly Wage Earner

The system uses the same personnel calculation rule to determine an overtime rate for an hourly wage earner. However, as a result of the employee subgroup grouping for the personnel calculation rule (for an hourly wage earner, 1), the personnel calculation rule “knows” that the working hours may not be divided per period.

Exercise 12: Links Between Planned Working Time and Basic Pay

Exercise Objectives

After completing this exercise, you will be able to:

- Explain the meaning of the grouping of employee subgroups and the relationship between planned working time and basic pay

Business Example

Our enterprise now has several different employee subgroups, which should be treated similarly for payroll purposes. This means that you have to group together your employee subgroups for personnel calculation rules. You will also have an overview of the links between planned working time and basic pay.

Task:

Do the following exercises:

1. In the IMG under Basic Pay, check that the correct grouping for personnel calculation rules has been assigned to your employee subgroup.
2. What are the possible entries for the grouping for personnel calculation rules? Has the correct grouping been assigned to your employee subgroup?

   ____

   ____

3. Should you change the meaning of the groupings, so that 1 is used for salaried employees, and 3 for industrial employees, for example?

   ____

   ____

4. Return to the *Hiring HR305* personnel action and create the *Planned Working Time* infotype (0007). Select the *NORM* work schedule rule. Before you save your entries, choose *Enter*. Note what happens after you choose Enter:

   ____

   ____

5. After you save your entries, the system displays the *Create Basic Pay screen (infotype 0008)*. This is part of the hiring action. Note the following default values:

Continued on next page

PS type:	________________
Pay scale area:	________________
Capacity util. level:	________________
Working hrs/period:	________________

Where do the values for *Capacity utilization level* and *Working hrs/period* come from?

____

____

Leave the infotype **without saving** your entries (choose *Exit*).

Solution 12: Links Between Planned Working Time and Basic Pay

Task:

Do the following exercises:

1. In the IMG under Basic Pay, check that the correct grouping for personnel calculation rules has been assigned to your employee subgroup.
   a) *Personnel Management → Personnel Administration → Payroll data → Basic Pay → Define EE Subgroup Grouping for PCR and Coll.Agrmt.Prov.*
   b) In the *Determine Work Area: Entry* dialog box, enter country grouping 99.
2. What are the possible entries for the grouping for personnel calculation rules? Has the correct grouping been assigned to your employee subgroup?

   ____

   ____

   a) A distinction is made between employees who are paid on an hourly basis, and those paid on the basis of their average working time per period. The possible entries for the personnel calculation rule are as follows:

      1 = Hourly wage earners

      2 = Employees with periodic payment (such as monthly wage earners)

      3 = Salaried employees

      4 = Special payment group - for German public sector only
   b) Check to see whether the following entry exists: Employee group *1*, Employee subgroup *##*, and PCR grouping *1*.
   c) **Note**: This entry was created when you copied your employee subgroup.
3. Should you change the meaning of the groupings, so that 1 is used for salaried employees, and 3 for industrial employees, for example?

   ____

Continued on next page

---

a) No. The meaning of the above personnel calculation rules is fixed in the system, and should NOT be changed. The only change you can make is to the assignment of *groupings for personnel calculation rules* to each employee subgroup.

4. Return to the *Hiring HR305* personnel action and create the *Planned Working Time* infotype (0007). Select the *NORM* work schedule rule. Before you save your entries, choose *Enter*. Note what happens after you choose Enter:

---

a) *Human Resources→ Personnel Management → Administration → HR Master Data*

b) Select *Personnel Actions*.

c) Enter the personnel number *305992##*.

d) Select *Hiring HR305*.

e) Choose *Execute*.

f) Choose *Execute infogroup* to restart the hiring personnel action.

g) Choose *Next Record* until you reach *Create Planned Working Time (infotype 0007)*.

h) Enter the *NORM* work schedule rule and choose *Enter*.

i) **The system automatically reads the working times from the work schedule**.

j) Save the data.

5. After you save your entries, the system displays the *Create Basic Pay screen (infotype 0008)*. This is part of the hiring action. Note the following default values:

PS type:	________________
Pay scale area:	________________
Capacity util. level:	________________
Working hrs/period:	________________

Where do the values for *Capacity utilization level* and *Working hrs/period* come from?

Continued on next page

Leave the infotype **without saving** your entries (choose *Exit*).

a)

PS type:	**90**
Pay scale area:	**50**
Capacity util. level:	**100.00**
Working hrs/period:	**163**

The values for *the capacity utilization level* and *the working time per period* originate from the values for *employment percentage* and *monthly working hours* from the Planned Working Time infotype.

Choose *Exit*.

Lesson Summary

You should now be able to:

- Describe how the working time stored in the Planned Working Time infotype (0007) is related to the payroll-relevant data stored in the Basic Pay infotype (0008).
- Explain the relevance of this information for payroll

Unit Summary

You should now be able to:

- Describe how the working time stored in the Planned Working Time infotype (0007) is related to the payroll-relevant data stored in the Basic Pay infotype (0008).
- Explain the relevance of this information for payroll

Unit 10

Remuneration Structure

Unit Overview

To begin with, parts of the remuneration structure are examined. The options for automatically defining default pay scale type and pay scale area are discussed in this section.

Unit Objectives

After completing this unit, you will be able to:

- Create the regional, industry-specific, financial, and time-related aspects of the remuneration structure.
- Define the control parameters depending on the employee subgroup and personnel subarea.
- Determine default values for pay scale data

Unit Contents

Lesson: Remuneration Structure

Lesson Overview

- Parts of the remuneration structure
- Options for defining default values

Lesson Objectives

After completing this lesson, you will be able to:

- Create the regional, industry-specific, financial, and time-related aspects of the remuneration structure.
- Define the control parameters depending on the employee subgroup and personnel subarea.
- Determine default values for pay scale data

Business Example

SAP makes a distinction between two remuneration types: salary and pay scale.

At your company, employees' pay is regulated by collective agreement provisions.

These collective agreement provisions are based on location (pay scale areas).

Remuneration Types

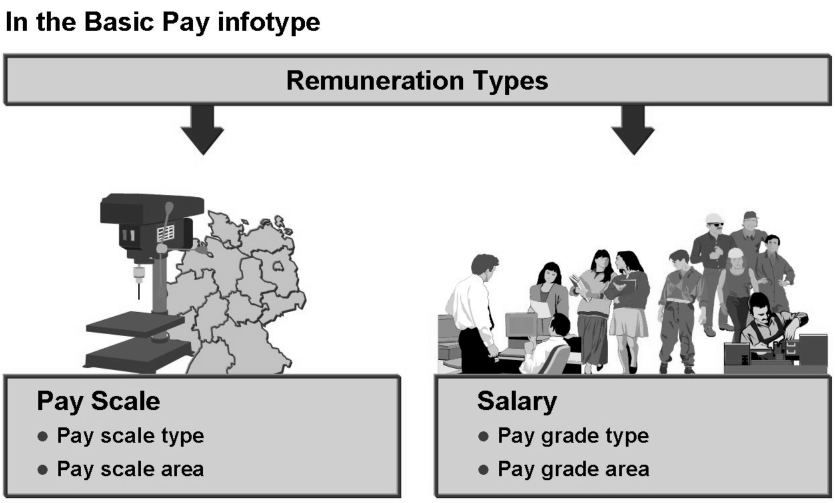


Figure 91: Remuneration Types

In the Basic Pay infotype, you can set the remuneration type to pay scale or salary using the *Change Remuneration Type* option in the Edit menu. The remuneration type can also be defaulted using the TARIF feature.

If you want to use a salary structure, refer to the courses on Compensation Management.

If you want to evaluate wage types indirectly (see next unit), you must build a pay scale structure (Table T510) because the system also uses this pay scale structure to evaluate wage types indirectly if you use salary structures. The following graphics and notes clarify how to create this pay scale structure.

Pay Scale Structure

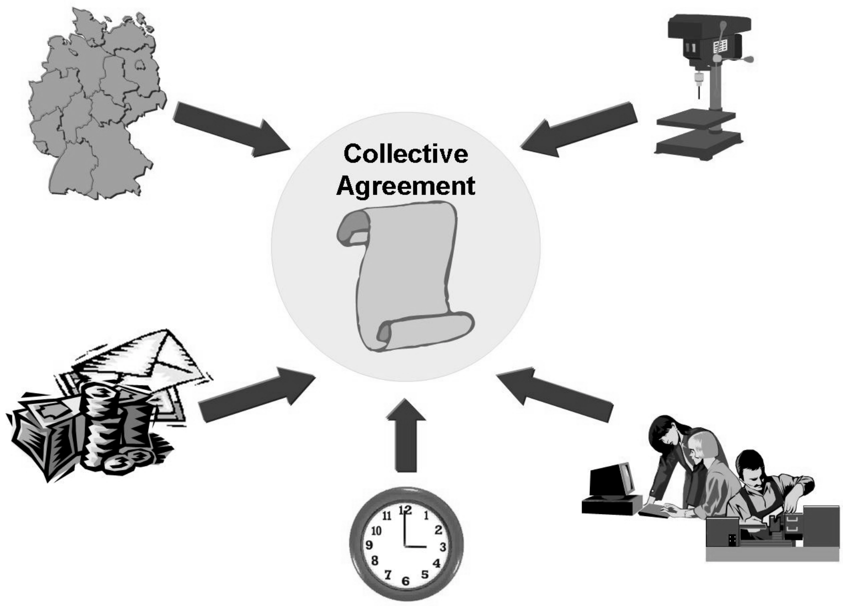


Figure 92: Overview: Pay Scale Structure

The remuneration structure includes information on regional (geographic) aspects, as well as data on specific industries, times, and finances. However, you must make a differentiation between pay scale employees and salaried employees.

You assign an employee to a remuneration structure when you create the Basic Pay infotype (0008) for the employee.

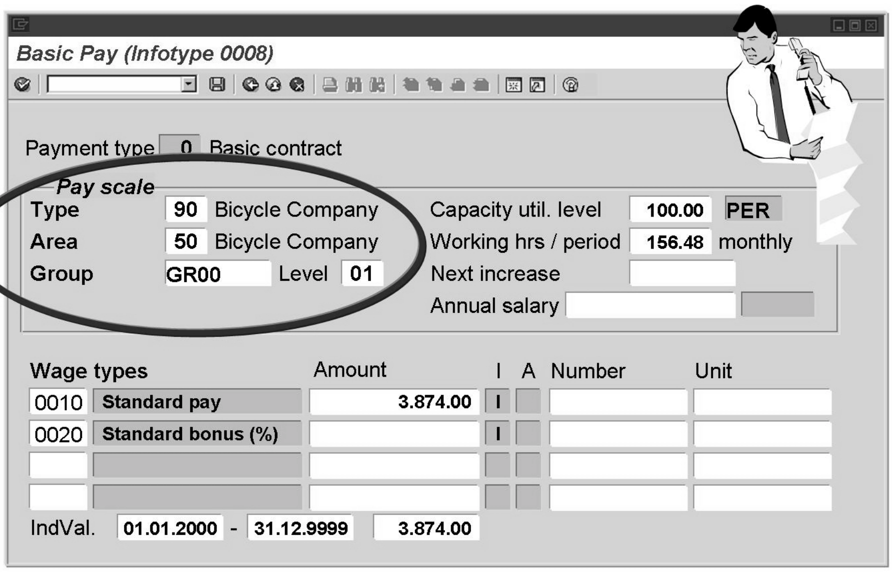


Figure 93: Pay Scale Data Stored in Basic Pay

You store an employee's pay scale data in the Basic Pay infotype (0008).

Even if you do not have collective agreement provisions at your company and employees negotiate their pay when you hire them, you must still define a pay scale type and pay scale area, an employee grouping for collective agreement provision, and a pay scale group. You must make an entry in these fields in infotype 0008 and there must be at least one entry in the relevant tables.

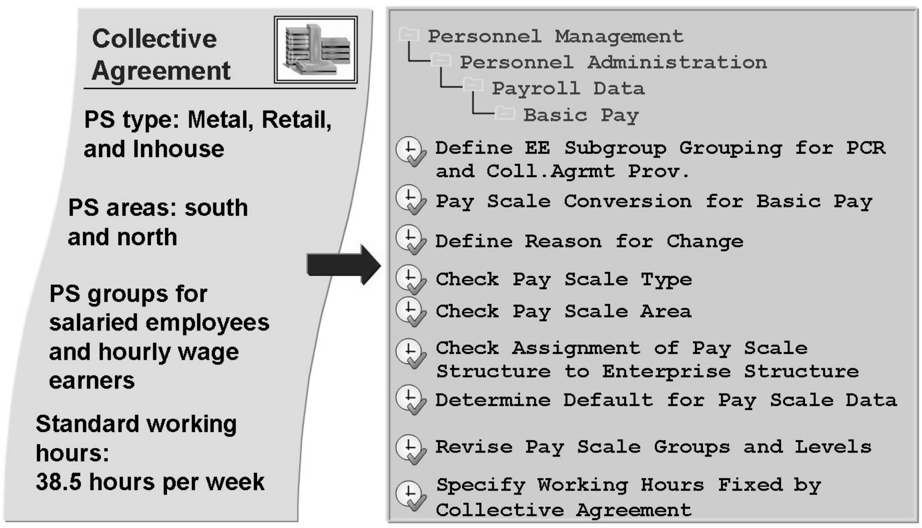


Figure 94: Depicting Pay Scale Data in the SAP System

At your company, employees' pay is regulated by a number of collective agreement provisions. The differences are based on location (pay scale areas).

The collective agreement provisions determine how much you pay the employees.

You use the pay scale groups and pay scale levels to depict the different payments in the system.

The individual IMG steps for setting up the remuneration structure in the SAP system appear on the right of the graphic.

Employee Subgroup Groupings for Collective Agreement

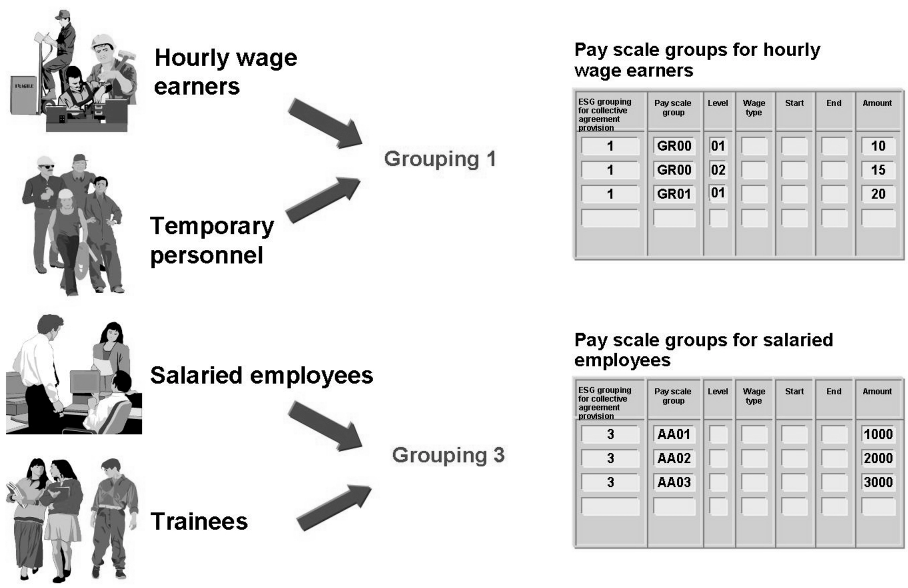


Figure 95: Employee Subgroup Groupings for Collective Agreement

The employee subgroup grouping for the collective agreement provision allows you to assign different employees to different pay scale groups. You can use the Customizing functions to group employee subgroups.

The SAP system contains the following groupings as standard:

1. Pay scale employee/hourly wage → Indicator 1
2. Pay scale employee/monthly wage → Indicator 2
3. Salaried employee → Indicator 3
4. Non-pay scale employee → Indicator 4
5. Executive → Indicator 5

The most important function of the employee subgroup grouping for the collective agreement provision is:

- To define pay scale groups and pay scale levels within the grouping for each pay scale type and pay scale area.

Pay Scale Type and Pay Scale Area

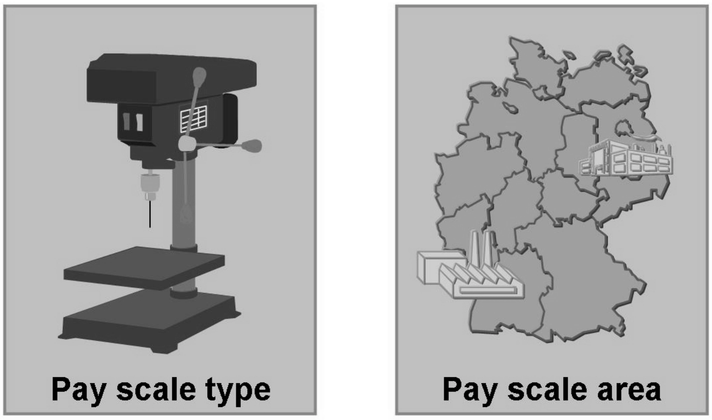


Figure 96: Defining Pay Scale Type and Pay Scale Area

Pay Scale Type

In the SAP system, pay scale types are two-character keys defined for each region. You must maintain the pay scale types when you set up your system.

Pay Scale Area

The pay scale area represents the geographical region to which a pay scale or collective agreement applies. In the SAP system, pay scale areas are two-character keys that are defined for each region. You maintain pay scale areas when you set up your system.

Default Values for Pay Scale Type and Pay Scale Area

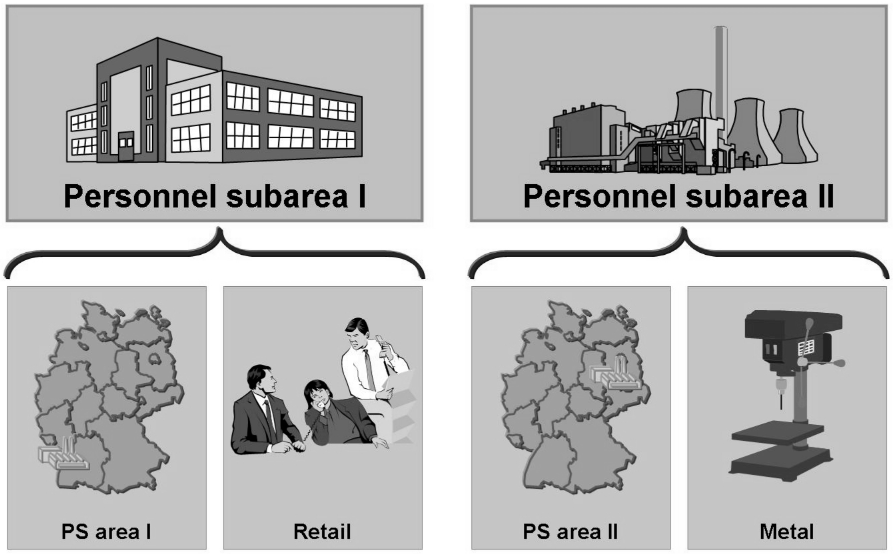


Figure 97: Assigning Pay Scale Type/Pay Scale Area to Personnel Subarea

You can assign the pay scale type and the pay scale area to the various personnel subareas using the IMG table "Check Assignment of Pay Scale Structure to Enterprise Structure".

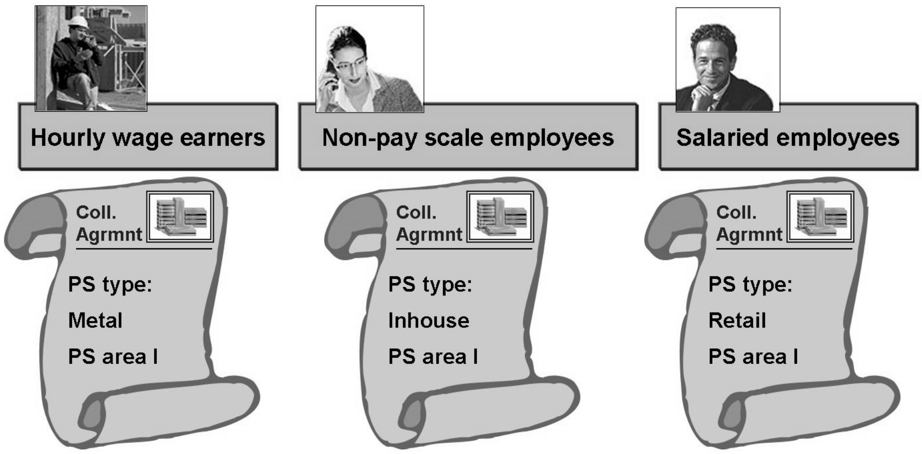


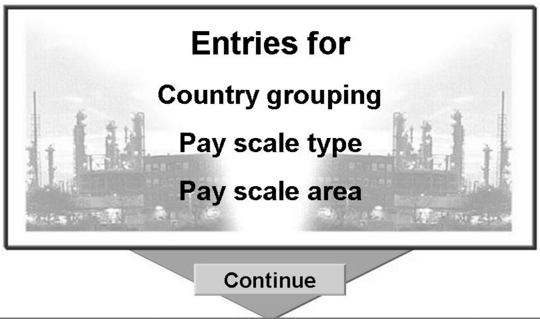
Figure 98: Default Pay Scale Data Using Feature TARIF

You can define default values using the pay scale type and pay scale area assigned to the personnel subarea, or with a decision rule.

You can define default values for different pay scale types and pay scale areas in the Basic Pay infotype (0008) for employees with different organizational assignment data.

You must enter the return value in the following format: xx/yy/z, where xx is the pay scale type, yy is the pay scale area, and z describes the type of planned remuneration (Organizational Management infotype (1005)). By specifying the type of planned remuneration, you can record information on salary and remuneration structures. In this way, the system can propose data for the pay scale type and pay scale area depending on the position currently occupied by the employee.

Pay Scale Table



ESG Grouping for Collective Agrmnt Prov.	Pay Scale Group	Level	Wage Type	Start Date	End Date	Amount
1	GR00	01				10
1	GR00	02				15
3	A01					1000
3	A01	01				1500

Figure 99: Pay Scale Groups and Pay Scale Levels

The enterprise and personnel structure determine which pay scale group and pay scale level view appears in infotype 0008.

You define pay scale groups and pay scale levels for each country grouping, pay scale type, pay scale area, and employee subgroup grouping for collective agreement provision.

Pay scale groups are used for scheduling job evaluations and indirect valuations.

Pay scale groups are divided into pay scale levels.

Exercise 13: Remuneration Structure

Exercise Objectives

After completing this exercise, you will be able to:

- Depict the pay scale structures to be used for production employees.

Business Example

Production employees in pay scale level 01 receive an hourly wage of EUR 15, as well as bonuses of EUR 2, EUR 3, and EUR 4 in each subsequent level.

Task 1:

Do the following exercises:

1. In the IMG (under Basic Pay), check the grouping for collective agreement provision for your employee subgroup ##. Your grouping is:

Task 2:

You want to assign a pay scale type and pay scale area to your production employee in personnel area PA## and personnel subarea Production 0004.

1. Check the list of pay scale types. You want to use pay scale type **90 CAB Company** for your employee. You do not need to create a new pay scale type.
2. Create a pay scale area to be used exclusively for your own personnel subarea. Create pay scale area ***70+##*** (for example, 71 for group 01), and name it ***Production area ##***. Your pay scale area is called:
3. In the appropriate Customizing table, assign the pay scale type and pay scale area to your personnel subarea in personnel area PA##.
4. Create a pay scale table. Use the data from the business scenario (see above) and the grouping for collective agreement provision to which your employee subgroup ## is assigned (refer to exercise 1):

Grpg	PS group	Lv.	Start date	End date	Amount
	GR##	01	01.01.2005	31.12.9999	**15,00**
	GR##	02	01.01.2005	31.12.9999	**17,00**
	GR##	03	01.01.2005	31.12.9999	**18,00**
	GR##	04	01.01.2005	31.12.9999	**19,00**

Continued on next page

Task 3:

Do the following exercises:

1. If you now create the *Basic Pay* infotype for your employee 305992##, you will see that the values for pay scale type and pay scale area are defaulted from the table *Check Assignment of Pay Scale Structure to Enterprise Structure*.

   This is because the TARIF feature is deactivated. Call the TARIF feature. How can you recognize that the feature is deactivated?

   What entries would you have to make to have the system propose pay scale type 90 and your pay scale area 70+## as default values for your employee according to employee subgroup?

   Do not activate or save the feature.

Task 4:

Do the following exercises:

1. Go to master data maintenance to create a new record for the *Basic Pay* infotype. Check the default values for the pay scale type and pay scale area. Select *GR##, Level 01* as the pay scale group and pay scale level. Finally, choose *Exit* to leave the *Basic Pay* infotype (0008) *WITHOUT* saving your entries.

Solution 13: Remuneration Structure

Task 1:

Do the following exercises:

1. In the IMG (under Basic Pay), check the grouping for collective agreement provision for your employee subgroup ##. Your grouping is:

   a) IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Define EE Subgroup Grouping for PCR and Coll.Agmt.Prov.*

   b) In the *Determine Work Area: Entry* dialog box, make sure that country grouping 99 is displayed.

   c) Check to see whether the following entry exists: Employee group *1*, employee subgroup ##, and ESG for PCR **1**.

Task 2:

You want to assign a pay scale type and pay scale area to your production employee in personnel area PA## and personnel subarea Production 0004.

1. Check the list of pay scale types. You want to use pay scale type **90 CAB Company** for your employee. You do not need to create a new pay scale type.

   a) IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Check Pay Scale Type*

   b) Pay scale type: 90, Pay scale type text: *CAB Company*

2. Create a pay scale area to be used exclusively for your own personnel subarea. Create pay scale area ***70+##*** (for example, 71 for group 01), and name it ***Production area ##***. Your pay scale area is called:

   a) IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Check Pay Scale Type*

   b) Select *New entries*.

   c) Enter ***70+##*** for the pay scale area, and ***Production area ##*** for the pay scale area text.

Continued on next page

3. In the appropriate Customizing table, assign the pay scale type and pay scale area to your personnel subarea in personnel area PA##.

   a) IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Check Assignment of Pay Scale Structure to Enterprise Structure*

   b) Change your entry as follows:

   c) Pers.area: *PA##,* Personnel subarea: *0004*, P.Scale Area *70+##*, P.scale type *90*

   d) Save your data and return to the IMG.

4. Create a pay scale table. Use the data from the business scenario (see above) and the grouping for collective agreement provision to which your employee subgroup ## is assigned (refer to exercise 1):

Grpg	PS group	Lv.	Start date	End date	Amount
	GR##	01	01.01.2005	31.12.9999	**15,00**
	GR##	02	01.01.2005	31.12.9999	**17,00**
	GR##	03	01.01.2005	31.12.9999	**18,00**
	GR##	04	01.01.2005	31.12.9999	**19,00**

   a) IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Revise Pay Scale Groups and Levels*

   b) In the Determine Work Area: Entry dialog box, enter *99* for the Country grouping, *90* for the Pay scale type, and *70+##* for the pay scale area.

   c) Select *New entries*.

   d) Create the following entries:

Grpg	PS group	Lv.	Start date	End date	Amount
1	GR##	01	01.01.2005	31.12.9999	**15,00**
1	GR##	02	01.01.2005	31.12.9999	**17,00**
1	GR##	03	01.01.2005	31.12.9999	**18,00**
1	GR##	04	01.01.2005	31.12.9999	**19,00**

   e) Save your data and return to the IMG.

Continued on next page

Task 3:

Do the following exercises:

1. If you now create the *Basic Pay* infotype for your employee 305992##, you will see that the values for pay scale type and pay scale area are defaulted from the table *Check Assignment of Pay Scale Structure to Enterprise Structure*.

   This is because the TARIF feature is deactivated. Call the TARIF feature. How can you recognize that the feature is deactivated?

   What entries would you have to make to have the system propose pay scale type 90 and your pay scale area 70+## as default values for your employee according to employee subgroup?

Continued on next page

Do not activate or save the feature.

a) IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Determine Default for Pay Scale Data*

b) The *Process feature TARIF: Decision tree* screen appears

c) To change the TARIF feature in tree maintenance, you would have to complete the following processing steps:

d) Position the cursor on the *PERSK* node in employee group *Active*, and select the *Create nodes* function. In the *Values for PERSK* screen, enter ## (## is your new employee subgroup). Then select *Transfer*.

e) Position the cursor on the new node and select *Create nodes*.

f) Accept the *Return value* default setting in the following screen and confirm by choosing *Enter*. In the *Return value for field value ##* screen that appears, enter 90/70+## (for example, 90/71 for group 01) and select *Transfer*.

Do not activate or save the feature.

Hint: (USA and Canada) If your payroll period is not monthly, you will need to set up the pay scale rule *Pay Scale Assignment → Periods for the Payroll Period.*

IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Set up payroll period for collective agreement provision*

Hint: (USA and Canada) If you do not use an annual salary calculation, you must define a *salary area* for each pay scale group and pay scale level.

IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Define pay scale salary ranges*

Continued on next page

Task 4:

Do the following exercises:

1. Go to master data maintenance to create a new record for the *Basic Pay* infotype. Check the default values for the pay scale type and pay scale area. Select *GR##, Level 01* as the pay scale group and pay scale level. Finally, choose *Exit* to leave the *Basic Pay* infotype (0008) *WITHOUT* saving your entries.

   a) *Human Resources → Personnel Management → Administration → HR Master Data*

   b) Choose *Maintain*.

   c) Enter the personnel number *305992##.*

   d) Select the *Basic Pay* infotype, and choose *Create*.

   e) The default for pay scale type/pay scale area should be: *90 / 70+##*

   f) Enter *GR##* for the pay scale group, and *01* for the pay scale level.

   g) Leave the *Basic Pay* (0008) infotype WITHOUT saving your entries (choose *Exit*) and return to the main menu.

Lesson Summary

You should now be able to:

- Create the regional, industry-specific, financial, and time-related aspects of the remuneration structure.
- Define the control parameters depending on the employee subgroup and personnel subarea.
- Determine default values for pay scale data

Unit Summary

You should now be able to:

- Create the regional, industry-specific, financial, and time-related aspects of the remuneration structure.
- Define the control parameters depending on the employee subgroup and personnel subarea.
- Determine default values for pay scale data

Unit 11

Wage Type Structure

Unit Overview

Selected wage types are copied using the wage type copier. These wage types are made permissable using certain Customizing settings for certain infotypes and employees. The dialog characteristics of wage types and the indirect valuation of wage types is also discussed in this section. Finally, the necessary steps are described that are necessary for the system to automatically propose wage types.

Unit Objectives

After completing this unit, you will be able to:

- Explain the meaning of wage types in SAP
- Copy wage types and know what one must pay attention to when copying wage types
- Identify the control indicators that are used to determine to whom the wage type can be assigned, when it can be assigned, and how often.
- Specify the dialog characteristics of the wage types
- Know how wage types can be valuated indirectly by the system
- Set wage types as defaults for an employee with the help of the LGMST feature and a wage type model, depending on the enterprise and personnel structure

Unit Contents

Lesson: Setting Up Wage Types

Lesson Overview

Copy wage types
Permissibility of wage types for:

- Certain infotypes
- Certain employee subgroups and/or personnel subareas

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the meaning of wage types in SAP
- Copy wage types and know what one must pay attention to when copying wage types
- Identify the control indicators that are used to determine to whom the wage type can be assigned, when it can be assigned, and how often.

Business Example

New wage types must be created in your company.

You should become familiar with wage types and customize the copied wage types so that they are only allowed in the Basic Pay infotype for certain employee subgroups.

General Information about Wage Types

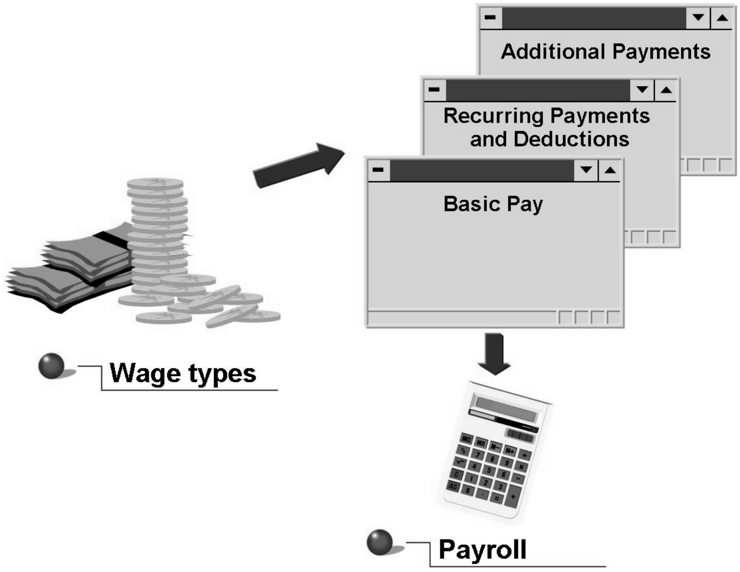


Figure 100: Employees' Payments and Deductions

Wage types are the key element in the wage type structure. Wage type is the most important concept in Human Resources. You use wage types to assign payments and deductions, as well as to control the Payroll program. You use wage characteristics to distinguish the individual wage types.

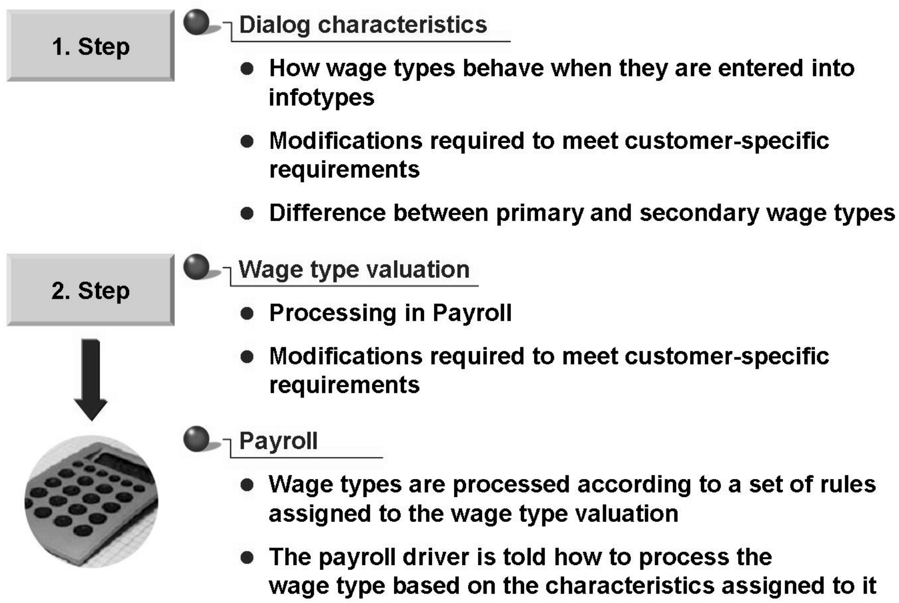


Figure 101: Setting Up Wage Types

In the mySAP ERP 2005 system, you need wage types to pay employees.

In the SAP system there are two main categories:

- Primary or dialog wage types
- Secondary or technical wage types

Each individual company defines the **primary or dialog wage types** so that they can depict the company's specific payroll requirements.

- The SAP system contains examples of primary/dialog wage types in a sample wage type catalog. For example, MA10 - standard pay.
- The characteristics are generally pre-defined for model wage types.

The standard system also contains **secondary or technical wage types**. You can recognize these as they have a slash “/” as the first character.

- Wage type characteristics have not been defined for technical wage types, as the system defines their value during payroll processing.
- Technical wage types are not part of the employee's master data.

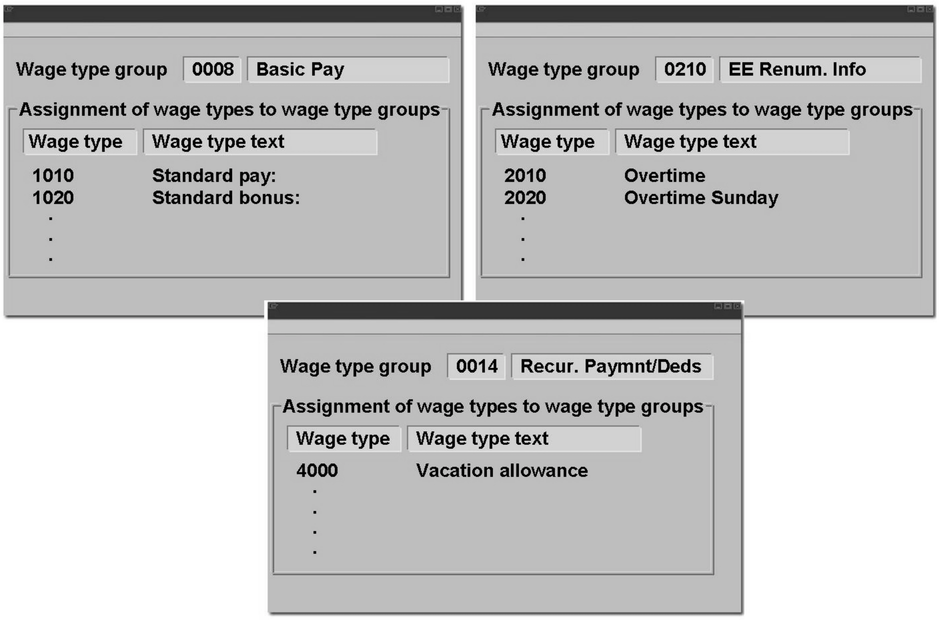


Figure 102: Using Wage Type Groups (Example)

SAP uses the wage type group concept to group wage types that have similar characteristics with regard to payroll.

Examples of wage type groups:

- 0008 - Basic Pay
- 0015 - Additional Payments
- 2010 - Employee Remuneration Information

You must assign all wage types to a wage type group. This is also true for user-defined wage types. You have to assign wage types to wage type groups so that you can work with the Implementation Guide (IMG). In the Implementation Guide, you only perform wage type maintenance for the wage types required in that particular section of the IMG. You select these wage types according to wage type group. This means that you can only use the IMG to maintain wage types that have been assigned to wage type groups.

If the wage types have not been assigned to a wage type group, they do not appear in the wage type maintenance in the IMG.

Dialog Characteristics

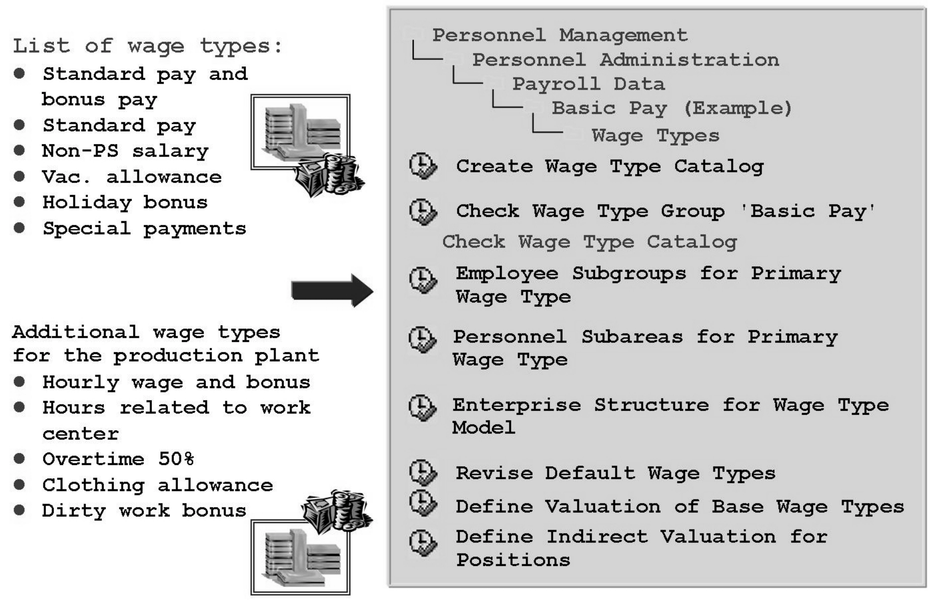


Figure 103: Dialog Characteristics of the Payment Structure in the SAP System

To ensure that the employees in your company receive the correct payment, you need to define different wage types.

The IMG steps that you must perform to define dialog wage types appear on the right, using the steps required for basic pay as an example.

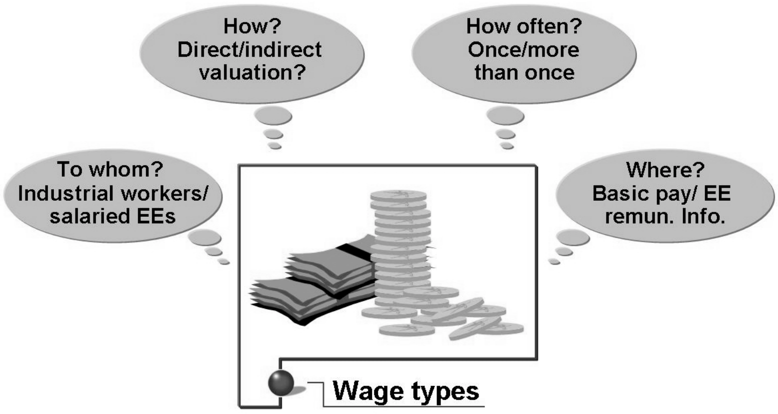


Figure 104: Overview - Dialog Characteristics

You must create wage types before an employee's pay can be calculated.

Wage types have the following functions:

- **Permissibility check** for wage and salary types
  - For each personnel area and personnel subarea
  - For each employee group and employee subgroup
  - For each infotype: if an infotype has a subtype that is a wage type, the time constraint determines how often a wage type can be available at any one time.

The **operation indicator** controls whether a wage type is a payment or a deduction.

The **input combination** controls which of the fields must be filled when you enter a wage type – amount, number, unit of time/measurement.

A wage type can be valuated **indirectly** if you enter a module name, module variant and a rounding indicator. The system then automatically reads the amount from the corresponding tables and you do not need to enter and store it in the Basic Pay infotype (0008).

Copying Wage Types

SAP - Sample Wage Type Catalog

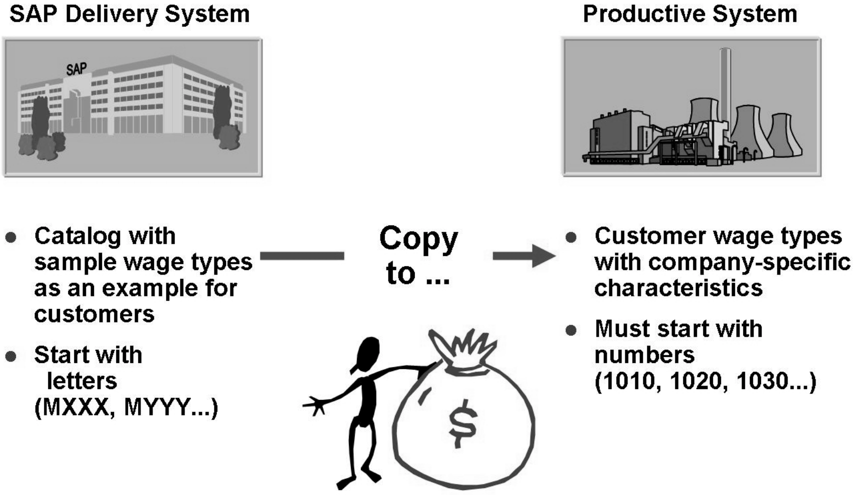


Figure 105: SAP - Sample Wage Type Catalog

The SAP system contains sample wage types. These sample wage types meet some of your company's requirements. You can use the wage type copier to copy the SAP sample wage types. You then use these copies as your wage types and can modify them so that they meet your specific requirements.

Create Wage Type Catalog

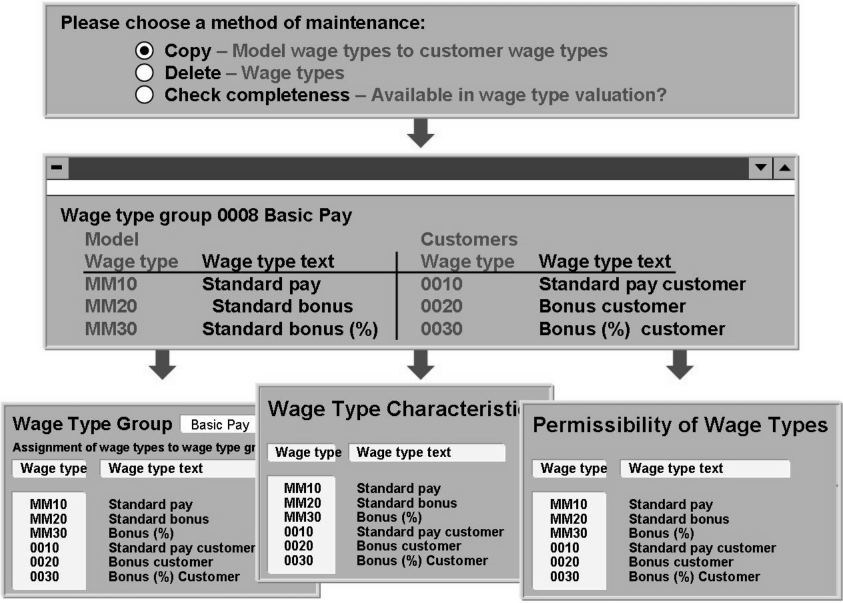


Figure 106: Create Wage Type Catalog

All model wage types start with a letter. Your own wage types, in other words the copies of model wage types, must start with a number.

When you copy the wage types, make sure that you copy the model wage type characteristics that determine how the wage types behave in dialog, as well as the characteristics that determine how the wage types behave in payroll.

You can check and modify the characteristics relevant for payroll when you carry out the payroll Customizing activities.

The wage types that you create via the copy method are included in all of the wage type groups and tables as the original wage type from which you copied. You can use the log to check what was copied.

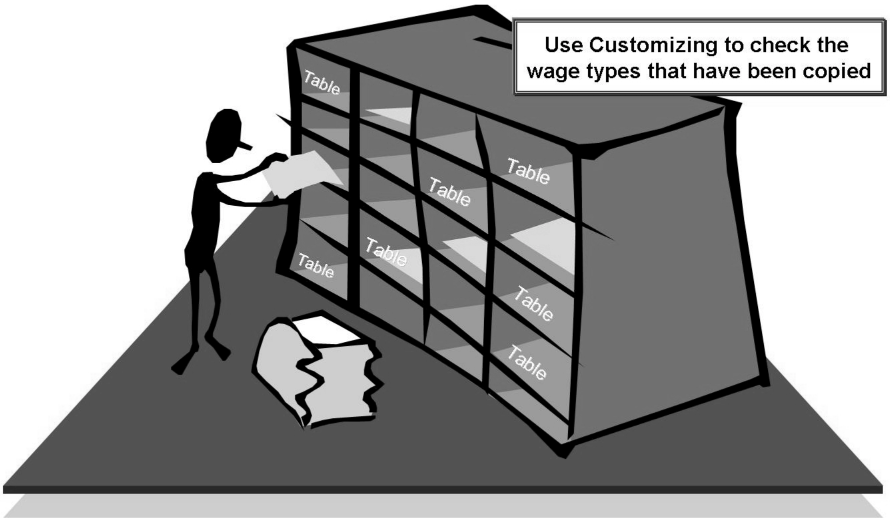


Figure 107: Checking the Individual Steps of the Copy Procedure

You have now copied the wage types. You now need to check the individual tables to which the customer wage types were copied.

You can check and modify the dialog characteristics in the subsequent customizing steps.

Permissibility of Wage Types in Infotypes

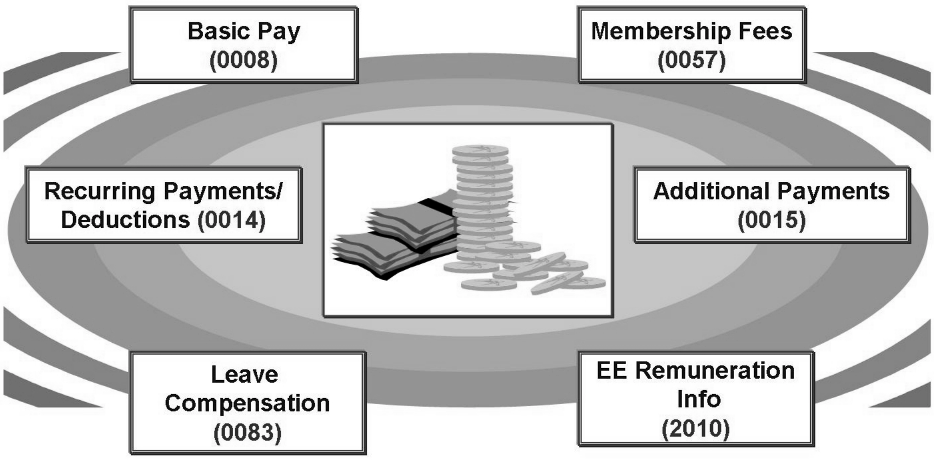


Figure 108: Defining Wage Type Permissibility for Infotypes

In the IMG, you can determine which wage types can be entered in the different infotypes. You can make settings in Customizing so only certain wage types are permissible for infotypes. If you could select all wage types in all infotypes, this would result in incorrect input data and mean that you are constantly searching for the correct wage type.

If you copy a wage type for an infotype using "Create wage type catalog", the system copies all the characteristics belonging to the wage type you are copying. This also applies to the wage type permissibility for an infotype.

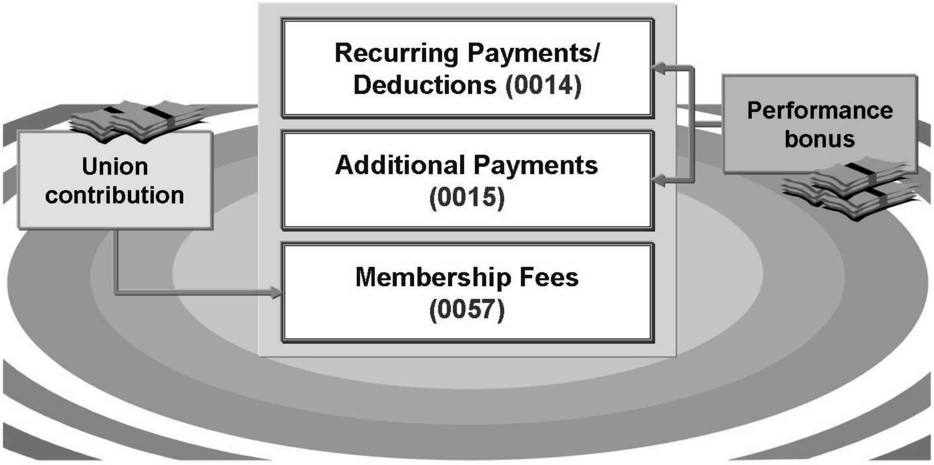


Figure 109: Wage Type Permissibility for Several Infotypes

If you want to use a wage type in several infotypes, then you must enter it in the permissibility tables of the respective infotypes.

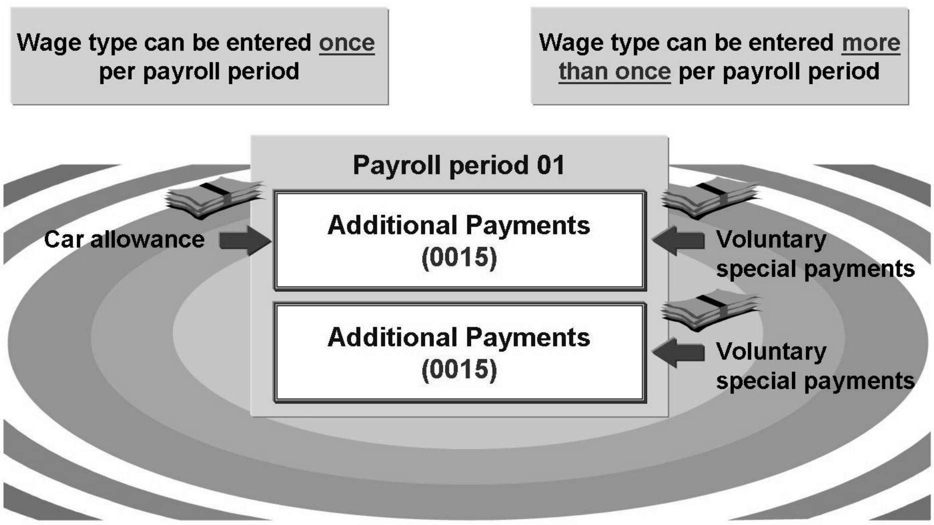


Figure 110: Input Frequency for Wage Types in Infotypes

When you simply configure a wage type, you can determine whether it can be entered **once** or **more than once** per payroll period.

Permissibility of Wage Types for Certain Employee Subgroups / Personnel Subareas

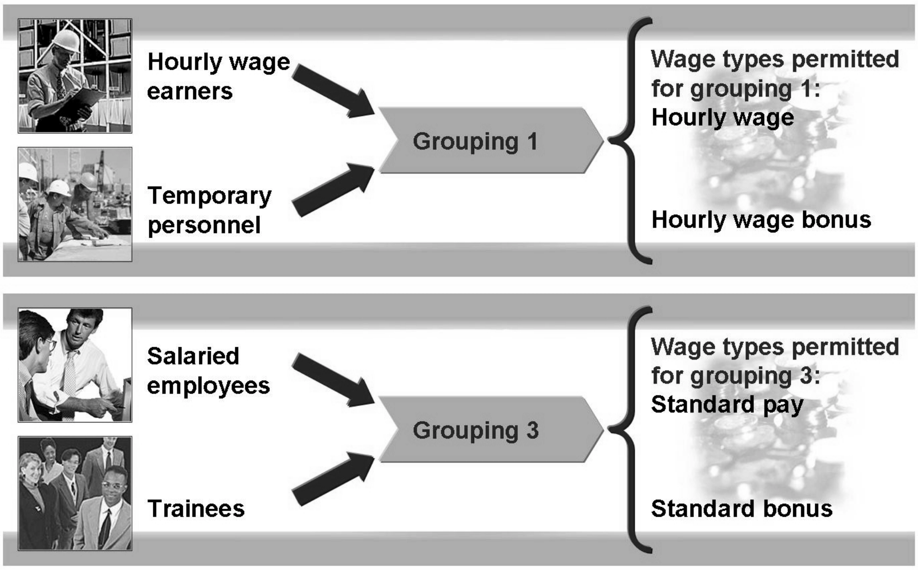


Figure 111: Employee Subgroup Grouping for Primary Wage Type

You can use personnel subarea groupings for primary wage types to define wage type permissibility for a specific enterprise structure, or employee subgroup groupings for primary wage types to define wage type permissibility for a personnel structure.

- Defining employee subgroups for primary wage types means that you group your employee subgroups.
- You can use these groups to determine which wage types can be entered for which employees.

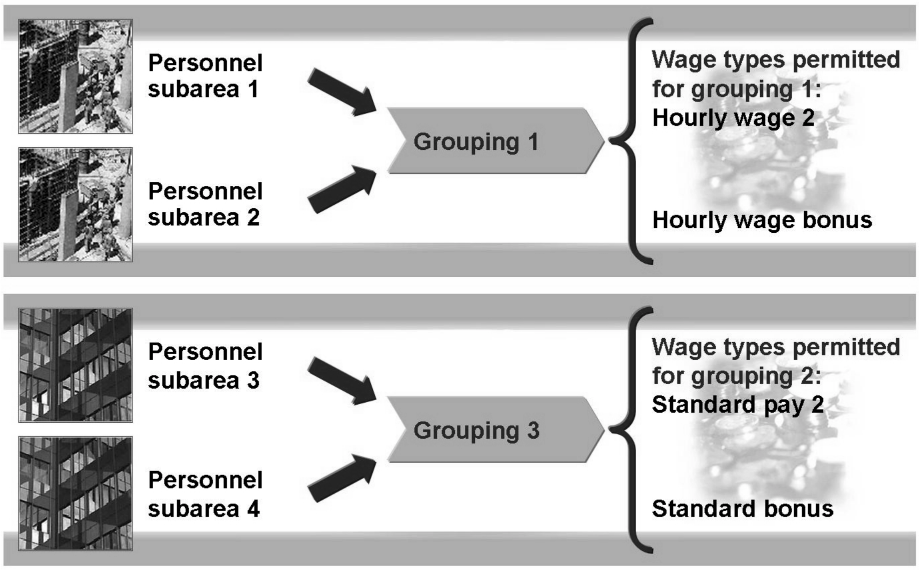


Figure 112: Personnel Subarea Groupings for Primary Wage Types

You can now also group your personnel subareas. This enables you to control the wage type permissibility for each personnel subarea.

When you group your personnel subareas, you can use both employee subgroups and personnel subareas as the grouping basis, or you can limit yourself to one of the options.

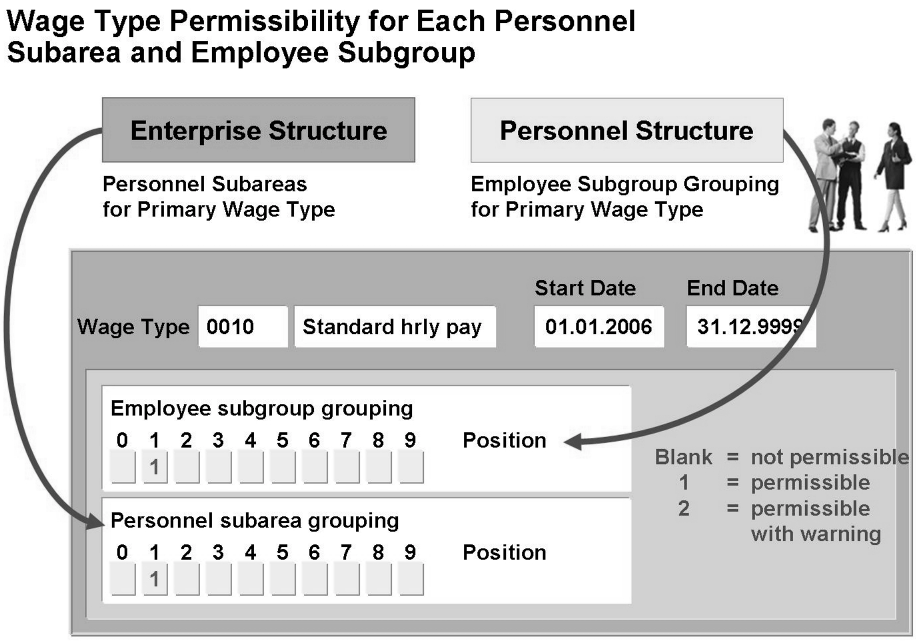


Figure 113: Wage Type Permissibility for Each Personnel Subarea and Employee Subgroup

In the last step, you specify whether a wage type is permissible for your personnel subarea grouping and your employee subgroup grouping. You can use the criterion Personnel Structure **and/or** the criterion Enterprise Structure.

Exercise 14: Setting Up Wage Types

Exercise Objectives

After completing this exercise, you will be able to:

- Set up customer wage types

Business Example

The SAP system contains a number of model wage types. You must copy these wage types, as productive systems can only use customer-specific wage types. In the following exercises, you will set up three wage types, which you will use for your employees in the Basic Pay infotype (0008).

Task 1:

1. Process the wage type catalog in the IMG: Copy the *Standard hourly pay (MM10)*, the *Standard Bonus (MM20)*, and the *Performance Bonus (%) (MM30)* to create customer wage types that start with your group number (*##10*, *##20*, and *##30*). Enter a text for the new wage types that includes your group number.

   When you create a copy, the system displays all tables that are affected. Record these:

   ________________________ ________________________

   ________________________ ________________________

   ________________________ ________________________

   ________________________ ________________________

   ________________________ ________________________

2. Check the wage type group for *Basic Pay* to ensure that it contains your new wage types. Check the wage type text too, so you can make changes to it if necessary.

3. Check the entry permissibility of your wage types for the *Basic Pay infotype*. Why are your wage types already permitted for this infotype?

   ____

   ____

4. Check to see which employee subgroup grouping for primary wage types is assigned to your employee subgroup. Record this information:

Continued on next page

5. Make sure that no grouping for primary wage types is assigned to your personnel subarea 0004 in personnel area PA##.

6. Ensure that the *permissibility of each wage type for each personnel subarea and employee subgroup* has been set up correctly for your copied wage types. These wage types should be permitted for the employee assigned to personnel subarea 0004 in personnel area PA##, and to employee subgroup ##.

Task 2:

The following exercises are optional

1. Create 5 copies of wage type MM10. Use the option of copying wage types to do so.

   Your wage types should have the following numbers: ##60, ##62, ##64, ##66 and ##68. Choose a name of your choice that contains your group number. Then exit the wage type copier.

2. You later realize that there is a typing error in the name of wage type ##62. You need to correct this error.

Solution 14: Setting Up Wage Types

Task 1:

1. Process the wage type catalog in the IMG: Copy the *Standard hourly pay (MM10)*, the *Standard Bonus (MM20)*, and the *Performance Bonus (%) (MM30)* to create customer wage types that start with your group number (*##10*, *##20*, and *##30*). Enter a text for the new wage types that includes your group number.

   When you create a copy, the system displays all tables that are affected. Record these:

   ________________________ ________________________

   ________________________ ________________________

   ________________________ ________________________

   ________________________ ________________________

Continued on next page

a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Create Wage Type Catalog*.

b) In the *Wage Type Maintenance* dialog box, select the *Copy* function.

c) Create the following entries. Hint: If you choose *Enter* after each entry, the text is copied automatically.

OWType	CWType	Wage type long text	Short text
MM10	##10	Standard hourly pay ##	Std. pay
MM20	##20	Standard bonus ##	Std. bon.
MM30	##30	Performance bonus ##	Perf.bon##

d) Remove the *Test run* indicator.

e) Select the three wage types to be copied, and choose *Copy*.

f) When you create a copy, the system displays all tables that are affected. Record these:

g) The affected tables are displayed in the log:

T511 Wage Types

T512T Wage type texts

T512W Wage type valuation

T512Z Permissibility of wage types per infotype

T52D7 Assignment of wage types to wage type groups

T52DZ Assign Customizing - Model Wage Type

T52EZ Time dependency of Payroll wage type posting

T539J Base wage type valuation

h) Return to the IMG.

Continued on next page

2. Check the wage type group for *Basic Pay* to ensure that it contains your new wage types. Check the wage type text too, so you can make changes to it if necessary.

   a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Group 'Basic Pay'*.

   b) Check the entries for your wage types *##10*, *##20*, *##30*.

   c) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check Wage Type Text*

   d) Here, you can still make changes to the wage type text.

   e) Return to the IMG.

3. Check the entry permissibility of your wage types for the *Basic Pay infotype*. Why are your wage types already permitted for this infotype?

   ____

   ____

   a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check entry permissibility per infotype*

   b) Why are your wage types already permitted for this infotype?

   c) As the reference wage types are already in this table, so are your own wage types (in other words, they are ready for input) (table T512Z).

4. Check to see which employee subgroup grouping for primary wage types is assigned to your employee subgroup. Record this information:

   a) Answer: **1**

   b) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Employee Subgroups for Primary Wage Type*

   c) In the *Determine Work Area: Entry* dialog box, enter your country grouping.

   d) Select *Continue*.

   e) Ensure that the *EE subgroup grouping 1* (hourly paid) is assigned to your *Employee subgroup (##)* from the *active employee group (1)*.

   f) Save your data and return to the IMG.

Continued on next page

5. Make sure that no grouping for primary wage types is assigned to your personnel subarea 0004 in personnel area PA##.

   a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Employee Subgroups for Primary Wage Type*

   b) Check the data and return to the IMG.

6. Ensure that the *permissibility of each wage type for each personnel subarea and employee subgroup* has been set up correctly for your copied wage types. These wage types should be permitted for the employee assigned to personnel subarea 0004 in personnel area PA##, and to employee subgroup ##.

   a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Determine Wage Type Permissibility for each PS and ESG*

   b) Select wage types ##10, ##20, and ##30, and choose *Details*. For each of your wage types, use *Next entry* to check that 1 is valid for the employee subgroup grouping. In other words, check that each wage type has the number 1 assigned to it.

   c) Return to the IMG.

Task 2:

The following exercises are optional

1. Create 5 copies of wage type MM10. Use the option of copying wage types to do so.

Continued on next page

Your wage types should have the following numbers: ##60, ##62, ##64, ##66 and ##68. Choose a name of your choice that contains your group number. Then exit the wage type copier.

a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Create Wage Type Catalog*.

b) In the *Wage Type Maintenance* dialog box, select the *Copy* function.

c) Select *Continue*.

d) Select wage type *MM10* and choose *Copy 1 WT*.

e) Your wage types should have the following numbers: ##60, ##62, ##64, ##66, and ##68.

f) In the dialog box that appears, enter the value *##60* in the *Wage type starts at* field, the value *5* in the *Number of wage types* field, and the value *2* in the *Increase each step* field.

g) Choose a name of your choice that contains your group number. Correct the names in the tables shown.

h) Deactivate the *Test run* option and choose *Copy*

i) Then exit the wage type copier.

2. You later realize that there is a typing error in the name of wage type ##62. You need to correct this error.

a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check Wage Type Text*

b) Correct the text and save your changes.

Lesson Summary

You should now be able to:

- Explain the meaning of wage types in SAP
- Copy wage types and know what one must pay attention to when copying wage types
- Identify the control indicators that are used to determine to whom the wage type can be assigned, when it can be assigned, and how often.

Lesson: Wage Type Characteristics

Lesson Overview

- Dialog characteristics of wage types
- Indirect valuation

Lesson Objectives

After completing this lesson, you will be able to:

- Specify the dialog characteristics of the wage types
- Know how wage types can be valuated indirectly by the system

Business Example

In your company, you should modify the dialog characteristics of the copied wage types or the requirements of your company.

An indirect valuation of the wage types is also necessary.

Wage Type Characteristics

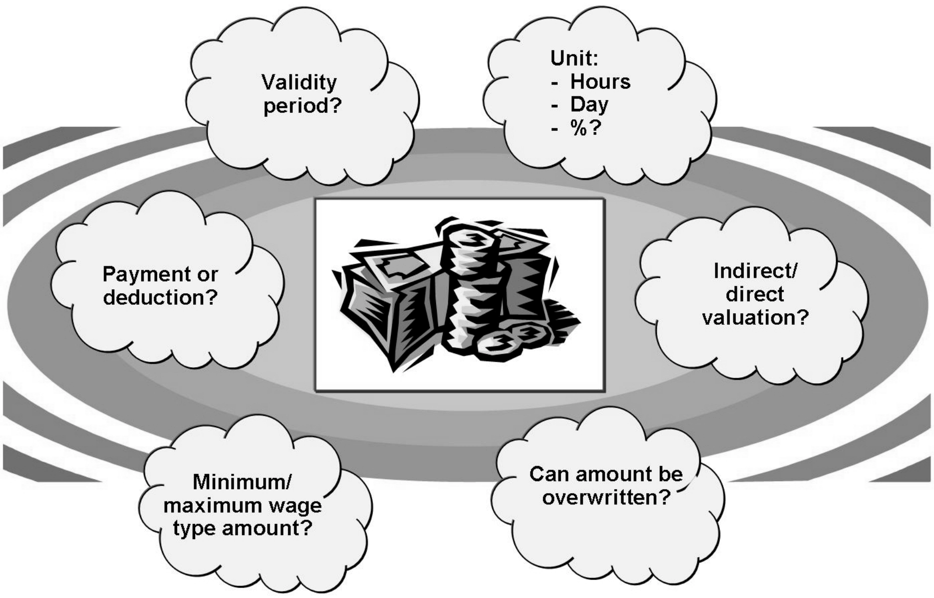


Figure 114: Checking Wage Type Characteristics

You can define the following wage type characteristics:

- Validity period
- Operation indicator
- Minimum and maximum wage type amount, if applicable
- Whether or not the wage type amount should be included in the basic pay total
- Default units of time/measurement, minimum and maximum number
- Input combinations for number and amount
- Indirect valuation and its characteristics

If you intend to implement the HCM Personnel Time Management component, you must also define the wage type as a bonus or a basic hourly pay wage type.

Indirect Valuation of Wage Types

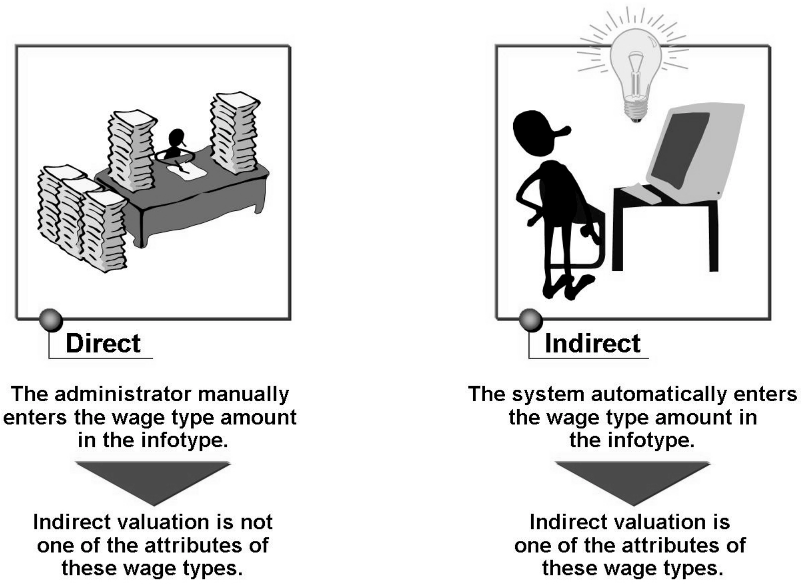


Figure 115: Valuation of Wage Types

Direct valuation:

- The amount that is to be used to valuate the wage type, is entered in the infotype manually.

Indirect valuation:

- The system automatically calculates the wage type amount and enters it in the infotype. In this case, the system imports and calculates the wage type amount from the table and you do not have to enter it manually. If the valuation table changes, the system automatically changes the HR master data record in accordance with the start or end date. This avoids mass data changes.
- The system can perform indirect valuation for the following infotypes:
  - Basic Pay (0008)
  - Recurring Payments/Deductions (0014)
  - Additional Payments (0015).

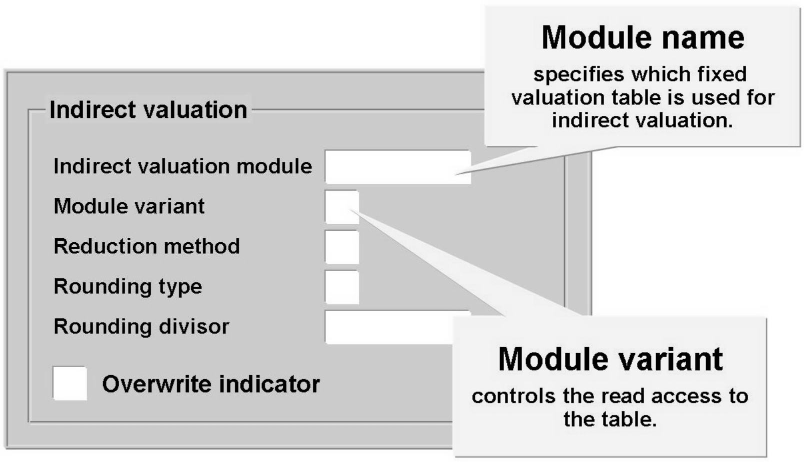


Figure 116: Indirect Valuation Using the Rule for Wage Type Characteristics

You can indirectly valuate a wage type by specifying a module name and variant.

Indirect valuation means that the system reads the amount from a table and you do not have to enter it manually in the infotype.

You define the valuation rule centrally, which means that you do not have to change master data records when you change the valuation.

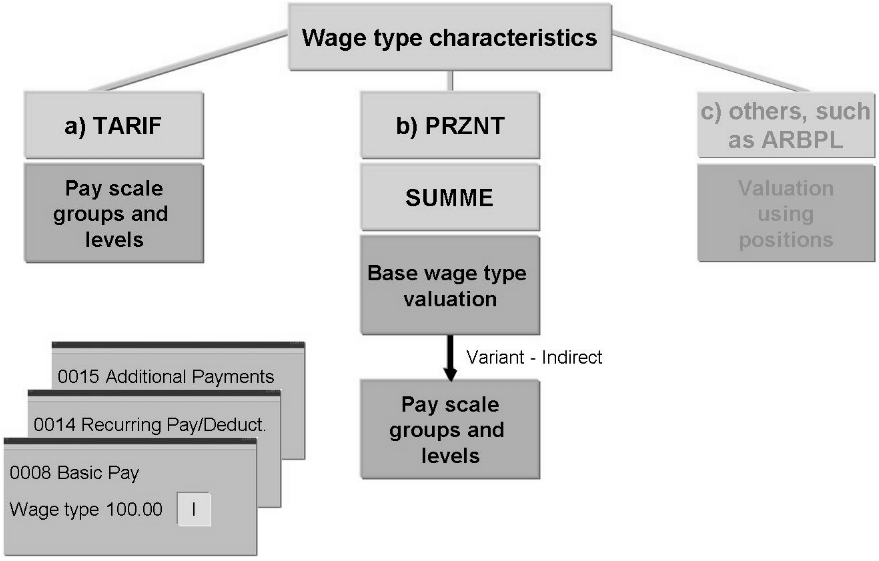


Figure 117: Module for Wage Type Characteristics (Indirect Valuation)

Different modules read different valuation tables. Explanation of the individual modules:

As of Release 4.6C, you can

- Adapt SAP standard modules to meet your enterprise-specific requirements
- Create your own modules with specific calculation guidelines

You can use the following tools:

- *Indirect Valuation Modules* table (T511V_M)
- Here, you can define your own customer-specific module
- Business Add-In (BAdI) HR: *Indirect Valuation of Wage Types* (HR_INDVAL).
- This BAdI creates or changes the calculation guideline for an indirect valuation module.

You can find further information in the Implementation Guide (IMG) for *Personnel Administration* under

Payroll Data → Indirect Valuation.

TARIF Module

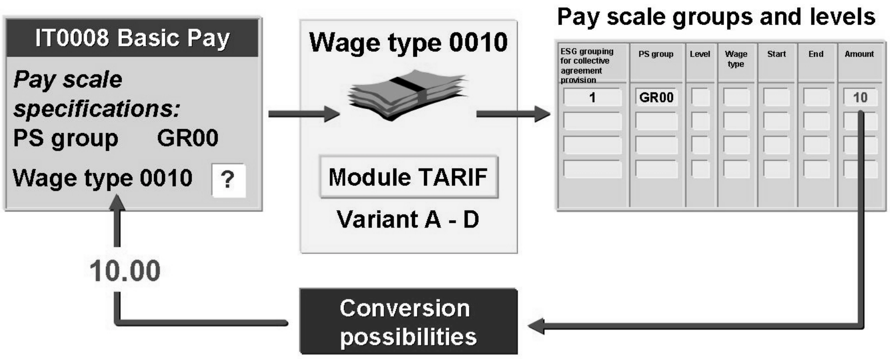


Figure 118: a) TARIF Module

When you enter a wage type in an infotype, the system reads the valuation module and variant assigned to it in the Wage Type Characteristics table.

The “TARIF” module uses pay scale data that is takes from the pay scale groups and pay scale levels you entered in the Basic Pay infotype.

You can use a conversion procedure to change this amount.

Pay Scale Groups and Levels

Module	Variant	Employee subgroup grouping for coll.agrmt.prov	Pay scale group	Pay scale level	Wage type	Amount
Pay scale	A	X	X	(X)	-	X
Pay scale	B	X	X	(X)	X	X
Pay scale	C	X	X	-	X	X
Pay scale	D	X	-	-	X	X

X = Required entry
\- = Entry must not exist
(X) = Entry can exist

Figure 119: Indirect Valuation Using the TARIF Module

Module variants control the type of table access, that is, which table fields the system reads.

The module TARIF has four variants (A - D), which have the following meaning:

- **A** Valuation is based on the pay scale group and level
- **B** Valuation is based on pay scale group/level and specific wage type
- **C** Valuation does not depend on pay scale level
- **D** Valuation does not depend on pay scale group or level

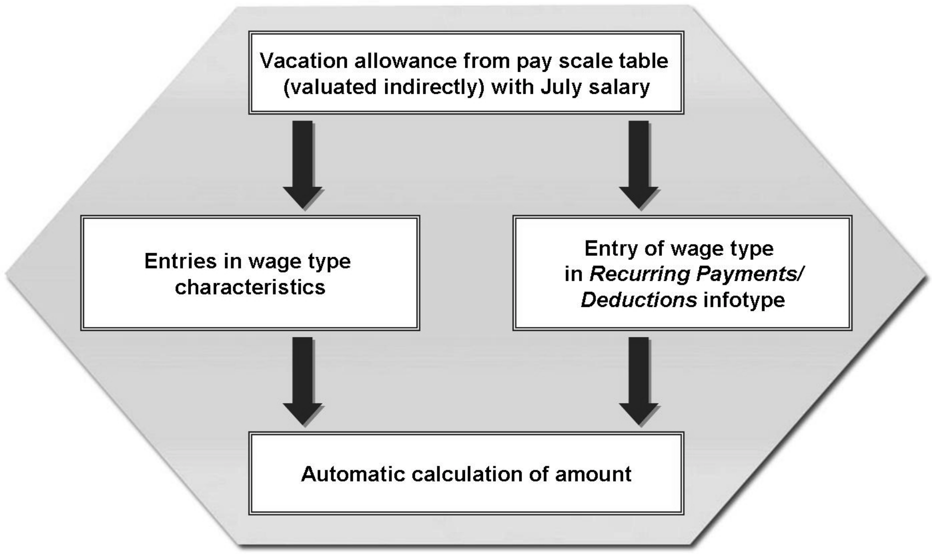


Figure 120: TARIF Module in "Recurring Payments/Deductions" Infotype

You can use modules for indirect valuation in other infotypes.

The example in the graphic shows how indirect valuation in the "Recurring Payments/Deductions" infotype helps determine how much vacation allowance an employee should receive.

PRZNT and SUMME Module

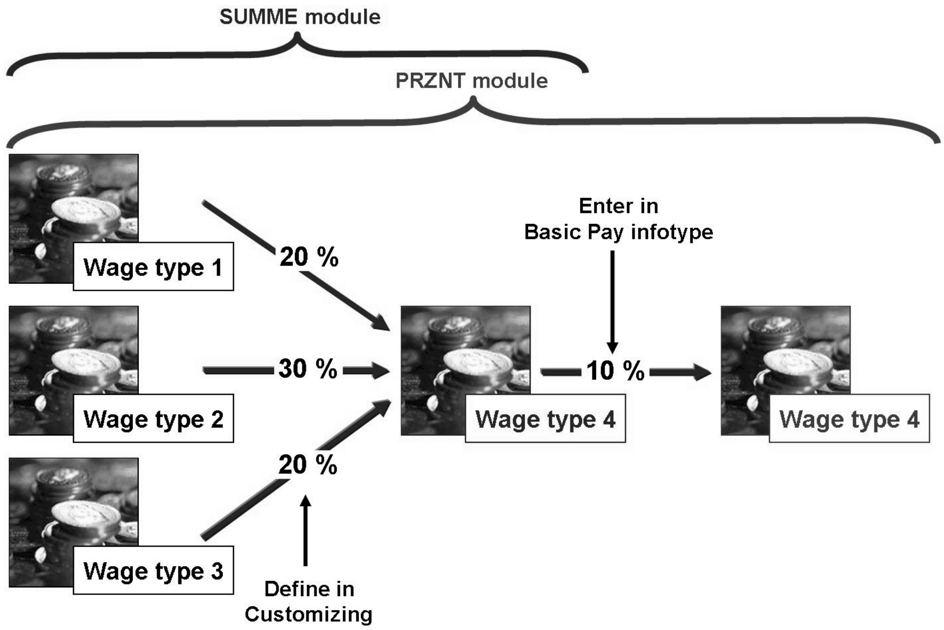


Figure 121: b) PRZNT/SUMME Module

The system calculates certain wage types as a percentage of other wage types.

You can use two modules for indirect valuation. Both of these modules are based on how you set up the Base Wage Type Valuation table.

In the IMG structure, choose:
Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Define valuation of base wage types

In the above example, either one of the following applies:

- **SUMME**
  The amount for wage type 4 should consist of 20% of wage type 1, 30% of wage type 2, and 20% of wage type 3.
- **PRZNT**
  The amount for wage type 4 should now consist of 20% of wage type 1, 30% of wage type 2, and 20% of wage type 3. In addition, the system should also multiply this amount by a percentage you enter in the Basic Pay infotype, in this case, 10%.

Base Wage Type Valuation

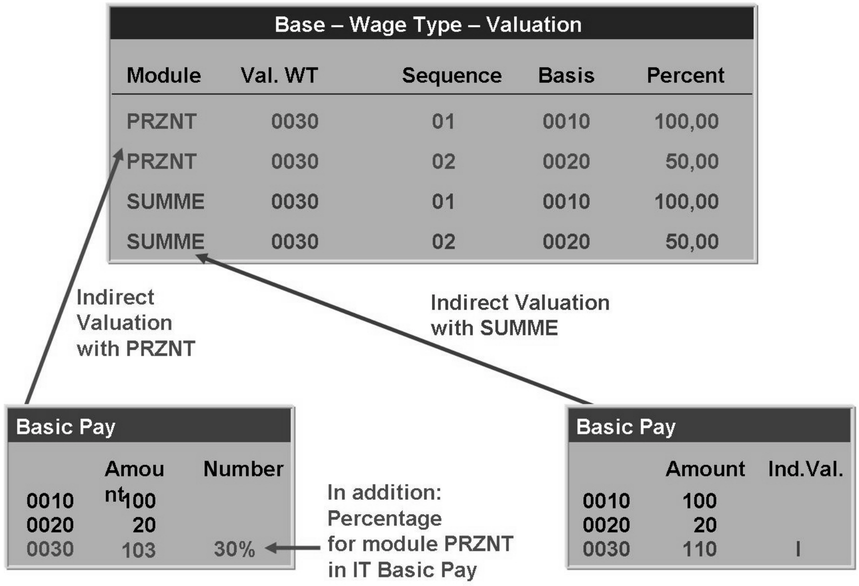


Figure 122: Base Wage Type Valuation

The system calculates certain wage types as a percentage of other wage types.

You can link the wage type to be valuated with several base wage types in the Base Wage Type Valuation table.

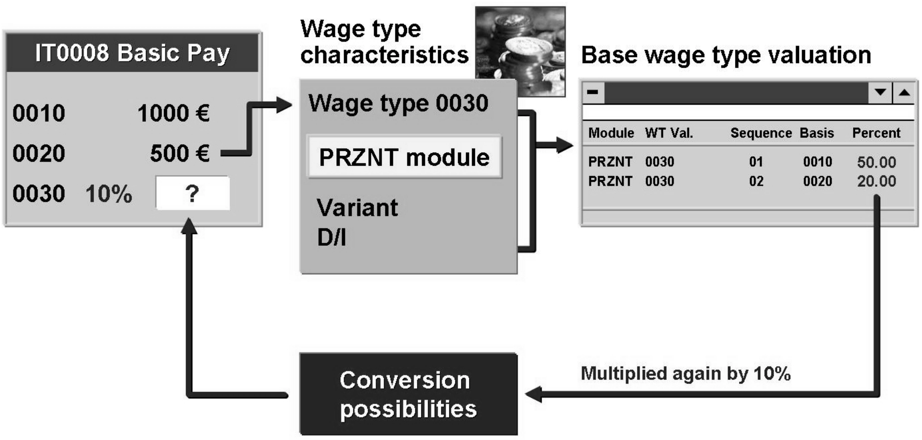


Figure 123: Indirect Valuation Using the PRZNT Module

In Define Valuation of Base Wage Types, you must specify which wage types the system is to use to calculate the percentage bonus (PRZNT). A distinction is made between **direct** and **indirect** variants.

- In the **direct** variant, you must enter the wage types the system is to use as a valuation basis in the infotype, otherwise, the system does not consider them. Furthermore, the amount of the wage type to be valuated is dependent on how high the amounts of the base wage type in the Basic Pay infotype are. This is because you can also overwrite the default amounts for indirectly valuated base wage types.
- Ín the **indirect** variant, the relevant wage types must not be in the infotype. The system determines the value internally, and uses it as the basis for additional calculations. This means that the base wage types must be valuated indirectly so that the system can read amounts from a pay scale table, for example.

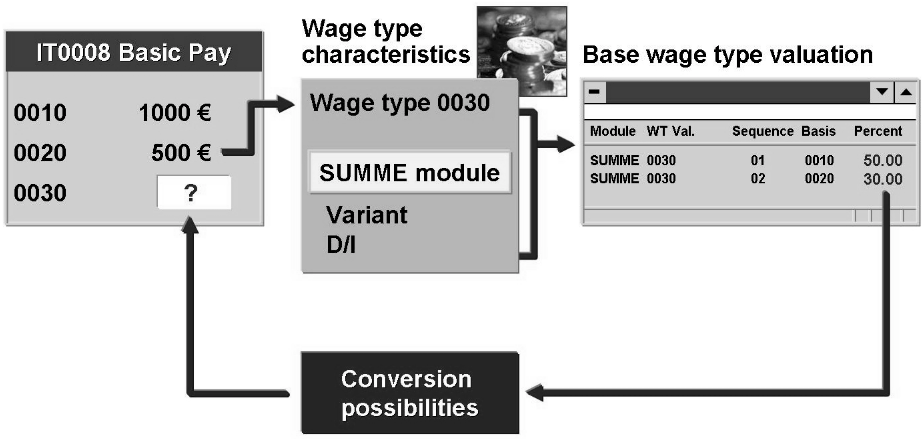


Figure 124: Indirect Valuation Using the SUMME Module

When making an indirect valuation using the SUMMER module, you must define which wage types the system is to use to calculate the percentage bonus (SUMME). A distinction is also made between direct and indirect variants.

In the direct variant, you must enter the wage types the system is to use as a valuation basis in the infotype, otherwise, the system does not consider them.

In the indirect variant, the relevant wage types must not be in the infotype.

Unlike the PRZNT module, you enter the percentage value in the SUMME module in the table as a fixed value, and it is therefore linked to the wage type.

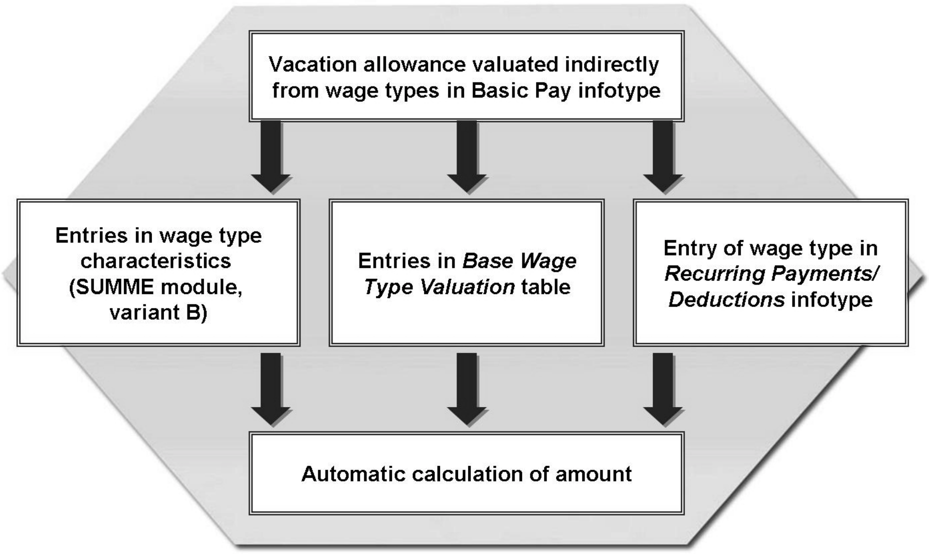


Figure 125: SUMME Module in "Recurring Payments/Deductions" Infotype

You can use the "SUMME" module for indirect valuation in other infotypes.

The example in the graphic shows how indirect valuation in the "Recurring Payments/Deductions" infotype helps determine how much vacation allowance an employee should receive. In this case, you use the SUMME module and module variant B.

You must also store the type of calculation in the "Basic Wage Type Valuation" table.

Overview: Indirect Valuation

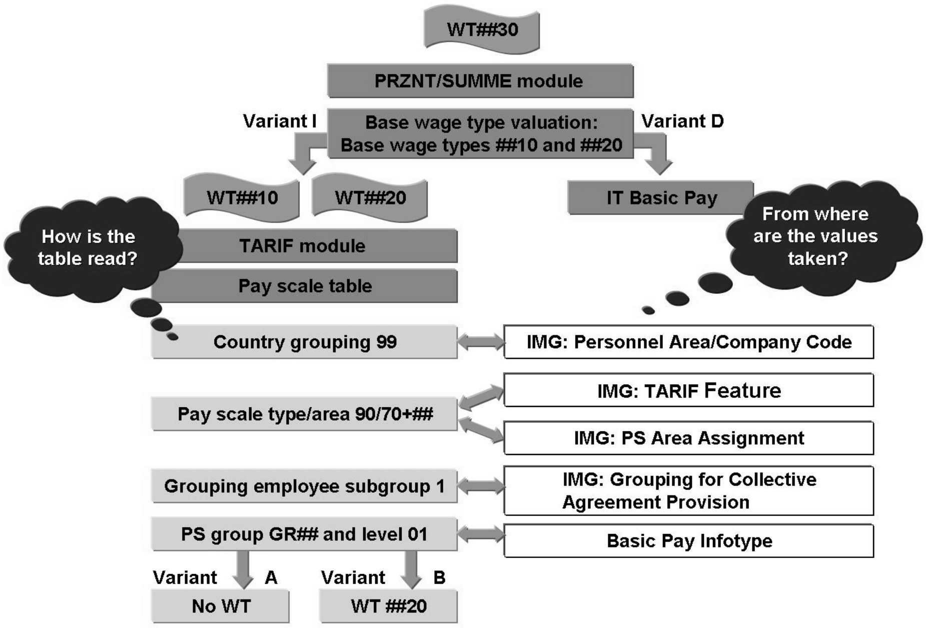


Figure 126: Course Examples of Indirect Valuation

This is how the individual modules are implemented for the basis of our exercise:

- Wage types **##10** and **##20** are both coded with feature TARIF in the wage type characteristics. This allows the system to access the pay scale table, from where it reads these wage types with the data already assigned to the employee.
- You assign this data in the following Customizing steps:
  - *Enterprise Structure → Assignment → Human Resources Management → Assignment of Personnel Area to Company Code*
  - *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Determine default for Pay Scale Area* or *Check Assignment of Pay Scale Structure to Company Structure*
  - *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Define EE Subgroup Grouping for PCR and Coll.Agrmt.Prov.*

The system reads each of these wage types differently. Wage type ##10 is encoded with variant A, while wage type ##20 is encoded with variant B. This means that the system will look in the pay scale table for the entry for wage type ##10 that does not have a maintained wage type. On the other hand, it will also look in the same table for the entry for wage type ##20 that has this *wage type* in the Wage type column.

Wage type **##30** should consist of base wage types ##10 and ##20. The Base Wage Type Valuation table determines the percentage rates of the two base wage types used to make up wage type ##30. The amounts depend on the variant used: For variant I (indirect), the base wage types must be valuated indirectly. In other words, the system reads the amounts from the pay scale table, for example. For variant D (direct), however, the system reads the amounts for base wage types from the Basic Pay infotype. In other words, the amount for wage type ##30 is dependent on any amounts that have been recorded for base wage types in this infotype.

ARBPL Module

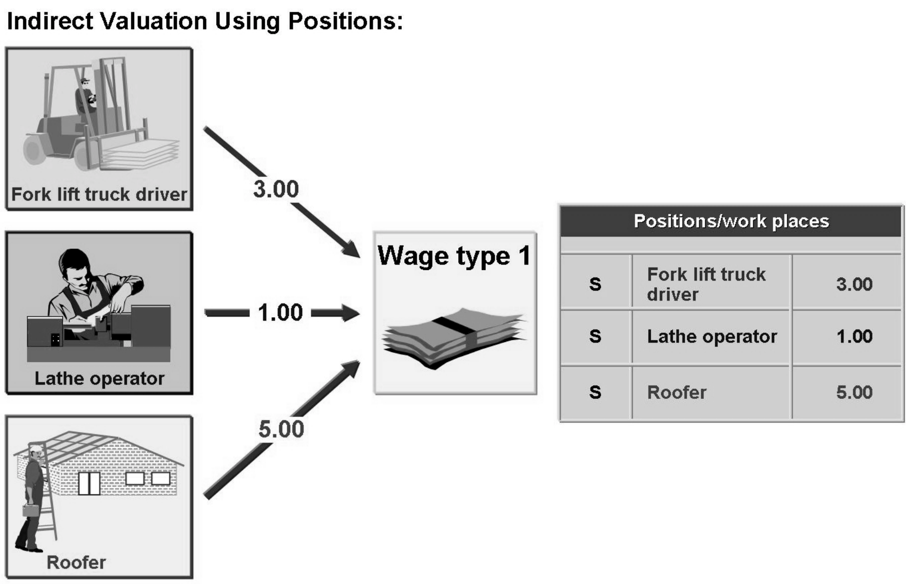


Figure 127: c) ARBPL Module

The indirect valuation module **ARBPL** uses the object type and the position number entered in infotype 0001 to calculate the wage type amount.

If module ARBPL is used with variant S (position) to valuate, the system bases its calculations on the position entered in the Organizational Assignment infotype (0001) and the country grouping in the "Position" table. You can enter a payment for the position in this table.

To access the position catalog, use the menu path described below in the IMG structure:

- *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Determine indirect valuation for positions/workcenters*

Indirect Valuation: Additional Attributes

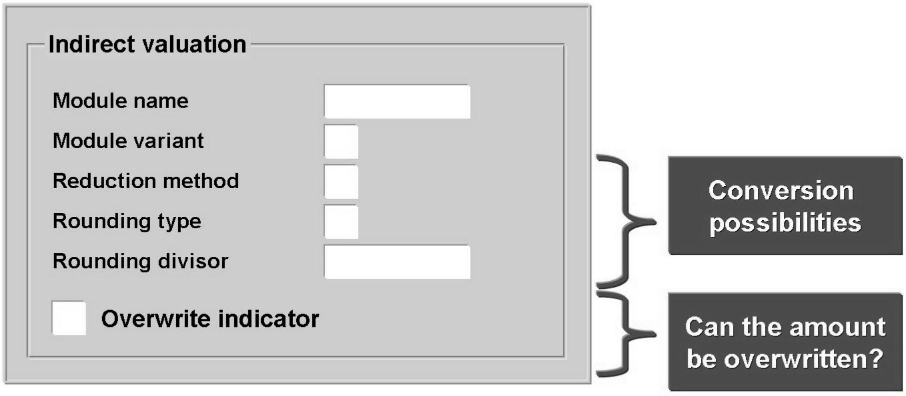


Figure 128: Indirect Valuation: Additional Attributes

In addition to the module name and defining module variants, you can enter additional attributes. For example:

Reduction method:: The values are defined as follows:

Blank or 1: No reduction

2: Reduction using the capacity utilization level (%) stored in infotype 0008

3: Reduction in accordance with the relationship between the individual weekly working time, and the standard weekly working time

4: Reduction based on the relationship between the individual hours per week taken from infotype 0007 and the standard weekly working time

5: Reduction in accordance with the relationship between the individual weekly working time minus the standard weekly working time, and the standard weekly working time

6: Reduction based on the relationship between the hours per week taken from infotype 0007 minus the standard weekly working time, and the standard weekly working time

Rounding type: A = amount is rounded down, B = amount is rounded up/down, C = amount is rounded up

Rounding divisor: Values 0 - 999999. For example, 100 means that the amount should be rounded up to a whole euro, dollar, and so on.

Overwrite indicator: Determines whether you can overwrite the wage type amount in the infotype.

Exercise 15: Wage Type Characteristics

Exercise Objectives

After completing this exercise, you will be able to:

- Defining wage type characteristics

Business Example

You must now define your wage type characteristics. For each of your wage types, you must define the correct module name, the correct module variant, and the reduction method for indirect valuation.

Task 1:

1. What is the difference between the TARIF module and the PRZNT module?

   ____
   ____
   ____
   ____

2. What do the module variants do?

   ____
   ____
   ____
   ____

3. Wage type ##10 should be valuated so that the wage type amount is read from the pay scale table (module ____________). The system should read the entry that has no entry in the Wage type column (variant ___). Make the appropriate entries in the wage type characteristics in the system.
   Fill in the blanks to complete the sentence.

4. Wage type ##20 should be valuated so that the wage type amount is read from the pay scale table (____________ module). The entry that is created for this wage type in the pay scale table should be read (variant ___). Make the appropriate entries in the wage type characteristics in the system.
   Fill in the blanks to complete the sentence.

Continued on next page

5. In the pay scale table, create entries for your new bonus wage type (##20) for each of your pay scale levels in pay scale group GR##.
6. Wage type ##30 should be valuated so that the amount is calculated as a percentage from base wage types ##10 and ##20. In addition, the amount in this wage type should be multiplied again by a percentage rate when entered in the Basic Pay infotype (module _______________).

   The wage type amount should be kept separate from the actual base wage type amounts in the Basic Pay infotype. In other words, the system should read the amounts from the pay scale table (variant ____________).

   The wage type amount should also be rounded up or down to the nearest whole figure (EURO).

   Make the appropriate entries in the wage type characteristics in the system.
7. Define the base wage type valuation for the *Performance Bonus (##30)* wage type. This valuation should consist of *50%* of base wage type **##10**, and *100%* of base wage type **##20**.

Task 2:

Optional exercises:

1. When you enter the amount for wage type ##30 in the Basic Pay infotype, it should be calculated as follows:

   - 20% of wage type amount ##10 and
   - 70% of wage type amount ##20.

   You want the amount in the Basic Pay infotype not to be influenced by the entry of a percentage.

   The wage type amount should be calculated independently of the percentage stored (if any) for the base wage types.

   As a precaution, create the Basic Pay infotype one more time. Enter your wage types again, and leave the infotype WITHOUT saving.
2. When you enter the amount of wage type 40## for your employee 305991## in the Recurring Payments/Deductions infotype, it is taken from the pay scale table. In this process, the amount for which the wage type is not filled should be taken into account.

   Create a record for the Recurring Payments/Deductions infotype and assign wage type 40##. What happens when you choose Enter?

Solution 15: Wage Type Characteristics

Task 1:

1. What is the difference between the TARIF module and the PRZNT module?

   Answer: For all wage types valuated with the TARIF module, the system reads the amount from the pay scale table depending on the pay scale group and level.

   For all wage types valuated with the PRZNT module, the system calculates the amount from the amounts of the base wage types. The calculated amount is multiplied by a percentage, which is entered in dialog while maintaining the Basic Pay infotype.

2. What do the module variants do?

   Answer: The module variant specifies the module for indirect valuation and controls how the read access should be assigned for a table.

3. Wage type ##10 should be valuated so that the wage type amount is read from the pay scale table (module TARIF). The system should read the entry that has no entry in the Wage type column (variant A). Make the appropriate entries in the wage type characteristics in the system.

   Answer: TARIF, A

   IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check Wage Type Characteristics*

   Select the wage type *##10*.

   Choose *Details*.

   Make the following entries:

   - Amount: +
   - Number/Unit: -
   - Indirect valuation module: *TARIF*
   - Module variant: *A*

   Save your entries.

Continued on next page

4. Wage type ##20 should be valuated so that the wage type amount is read from the pay scale table (TARIF module). The entry that is created for this wage type in the pay scale table should be read (variant B).Make the appropriate entries in the wage type characteristics in the system.

   Answer: TARIF, B,

   IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check Wage Type Characteristics*

   Select the wage type *##20*.

   Choose *Details*.

   Make the following entries:

   - Amount: +
   - Number/Unit: -
   - Indirect valuation module: *TARIF*
   - Module variant: *B*

   Save your entries.

Continued on next page

5. In the pay scale table, create entries for your new bonus wage type (##20) for each of your pay scale levels in pay scale group GR##.

   a) *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Revise Pay Scale Groups and Levels*

   b) In the Determine Work Area: Entry dialog box, enter your country grouping *99*, pay scale type *90* and pay scale area *70+##* .

   c) Select the entries *GR##*.

   d) Select *Copy as*.

   e) Add the following table entries with wage type *##20*:

Grpg	PS group	Lv.	Wage type	Start date	End date	Amount
1	GR##	01	##20	01.01.2006	31.12.9999	Your choice
1	GR##	02	##20	01.01.2006	31.12.9999	Your choice
1	GR##	03	##20	01.01.2006	31.12.9999	Your choice
1	GR##	04	##20	01.01.2006	31.12.9999	Your choice

   f) Save your data and return to the IMG.

Hint: Maintain the entries for the annual salary if this is necessary for your country **(not for Germany)**:

IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Define annual salary*.

In the *Choose activity* dialog box, select the action *Relevant wage types for annual salary valuation*.

Val. WT	No.	Start date	End date	Base WT	Per-cent
ANSAL	##+10	01.01.1990	31.12.9999	##10	100,00

6. Wage type ##30 should be valuated so that the amount is calculated as a percentage from base wage types ##10 and ##20. In addition, the amount in this wage type should be multiplied again by a percentage rate when entered in the Basic Pay infotype (module _______________).

Continued on next page

The wage type amount should be kept separate from the actual base wage type amounts in the Basic Pay infotype. In other words, the system should read the amounts from the pay scale table (variant ____________).

The wage type amount should also be rounded up or down to the nearest whole figure (EURO).

Make the appropriate entries in the wage type characteristics in the system.

a) **PRZNT** module

b) Variant **I (indirect)**

c) IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check Wage Type Characteristics*

d) Select wage type ##30.

e) Choose Details.

f) Make the following entries:

- Amount: -
- Number/Unit: +
- Time unit/meas: *Percent*
- Indirect valuation module: *PRZNT*
- Module variant: *I*
- Rounding type: *B*
- Rounding divisor: *100*

g) Save your entries.

7. Define the base wage type valuation for the *Performance Bonus (##30)* wage type. This valuation should consist of *50%* of base wage type **##10**, and *100%* of base wage type **##20**.

a) *IMG*: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Define valuation of base wage types*

b) Create the following entries:

Mod.	WT WT	No.	Start date	End date	Base WT	Percent
PRZNT	##30	1	01.01.2006	31.12.9999	##10	50,00
PRZNT	##30	2	01.01.2006	31.12.9999	##20	100,00

Save your data and return to the IMG.

Continued on next page

Task 2:

Optional exercises:

1. When you enter the amount for wage type ##30 in the Basic Pay infotype, it should be calculated as follows:

   - 20% of wage type amount ##10 and
   - 70% of wage type amount ##20.

   You want the amount in the Basic Pay infotype not to be influenced by the entry of a percentage.

   The wage type amount should be calculated independently of the percentage stored (if any) for the base wage types.

Continued on next page

As a precaution, create the Basic Pay infotype one more time. Enter your wage types again, and leave the infotype WITHOUT saving.

a) **Wage type characteristics:**

IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check Wage Type Characteristics*

b) Select the wage type *##30*.

c) Choose *Details*.

d) Make the following entries:

- Amount: -
- Number/unit: -
- Time unit/meas.: *empty*
- Indirect valuation module: *SUMME*
- Module variant: *D*

e) Save the data.

f) **Base Wage Type Valuation table:**

IMG: *Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Define valuation of base wage types*

g) Create the following entries:

Mod.	WT WT	No.	Start date	End date	Base WT	Percent
SUMME	##30	1	01.01.2006	31.12.9999	##10	20,00
SUMME	##30	2	01.01.2006	31.12.9999	##20	70,00

h) Save your data and return to the IMG.

i) Create a new Basic Pay infotype record, and assign your three wage types to it. Do not save this infotype yet.

2. When you enter the amount of wage type 40## for your employee 305991## in the Recurring Payments/Deductions infotype, it is taken from the pay scale table. In this process, the amount for which the wage type is not filled should be taken into account.

Continued on next page

Create a record for the Recurring Payments/Deductions infotype and assign wage type 40##. What happens when you choose Enter?

a) When you enter the amount of wage type 40## in the Recurring Payments/Deductions infotype, it is taken from the pay scale table. In this process, the amount for which the wage type is not filled should be taken into account.

b) **Wage type characteristics:**

   IMG: *Personnel Management → Personnel Administration → Payroll Data → Recurring Payments/Deductions → Wage Types → Check Wage Type Catalog → Check Wage Type Characteristics*

c) Select wage type 40##

d) Choose *Details*

e) Make the following entries:

   - Amount: -
   - Number/Unit: -
   - Time unit/meas: *Leave blank*
   - Indirect valuation module: *TARIF*
   - Module variant: *A*

f) Save the data.

g) Create a record for the Recurring Payments/Deductions infotype and assign wage type 40##. What happens when you choose Enter?

h) Easy Access Menu:

   Human Resources → Personnel Management → Administration → HR Master Data

i) Choose Maintain.

j) Enter the personnel number 305991#.

k) Select the Recurring Payments/Deductions infotype and select Create

l) Choose 1st of this month in the Valid field

m) Enter 40## in the Wage Type field

n) Select Enter.

o) The relevant value is taken from the pay scale table.

Lesson Summary

You should now be able to:

- Specify the dialog characteristics of the wage types
- Know how wage types can be valuated indirectly by the system

Lesson: Default Wage Types

Lesson Overview

Wage types should be automatically proposed in the Basic Pay infotype by the system.

Lesson Objectives

After completing this lesson, you will be able to:

- Set wage types as defaults for an employee with the help of the LGMST feature and a wage type model, depending on the enterprise and personnel structure

Business Example

You should set up the system with Customizing settings so that wage types are automatically proposed in the Basic Pay infotype when hiring an employee.

Default Wage Types for the Basic Pay Infotype

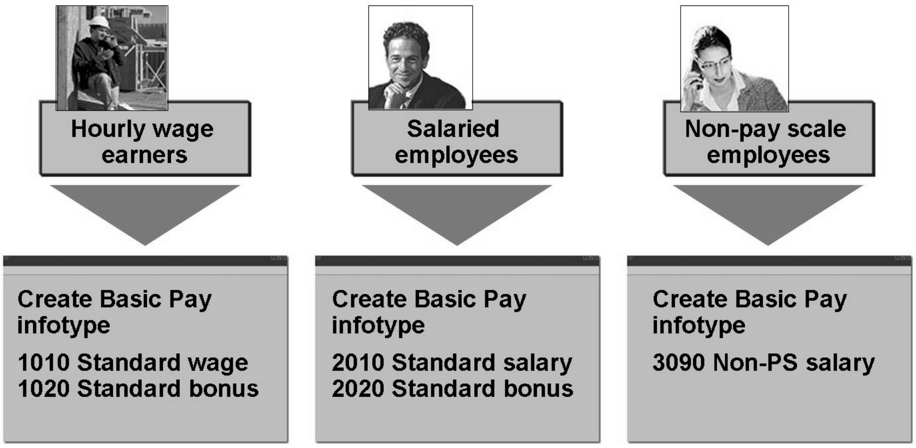


Figure 129: Default Wage Types for Basic Pay

If you want the system to suggest a default wage type for basic pay, this wage type must be included in a wage type model. The system suggests a wage type model based on an employee's organizational assignment. For example:

- Company code
- Personnel area
- Employee group
- Employee subgroup

The system uses this information to define a default for a wage type model.

LGMST Feature

To reduce the amount of routine work involved in creating a Basic Pay infotype record (0008), the system displays the default wage types for the administrator either as required or optional entries.

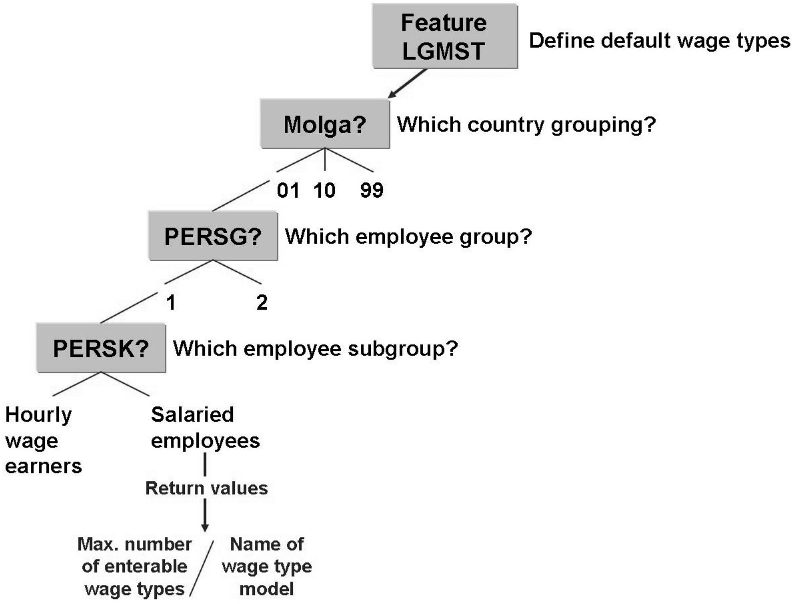


Figure 130: LGMST Feature

You can use the Default Wage Types for Basic Pay table to define default wage types for the Basic Pay infotype (0008).

An entry is accessed by processing a decision tree. The feature is called LGMST.

The LGMST feature has two return values: firstly, the maximum number of enterable wage types in the Basic Pay infotype, and secondly, the wage type model the system is to use.

Wage Type Model

Wage Type Model	Sequence	Mode	Wage Type
Model HRL Y00	1	F	0010
Model HRL Y00	2	F	0020
Model HRL Y00	3	O	0030

Figure 131: Defining Wage Type Models

In the wage type model, you define the sequence of the defaulted wage types and whether you can overwrite the defaulted wage type (in the Mode field).

The IMG activity to do this is called "Revise Default Wage Types".

Exercise 16: Default Wage Types

Exercise Objectives

After completing this exercise, you will be able to:

- Defining default wage types

Business Example

Finally, you want the system to propose wage types independently of the employee's organizational assignment. This would mean that you no longer have to enter wage types manually in the Basic Pay infotype.

Task 1:

1. Define a wage type model with the naming convention HRLY##. This should contain your three new customer wage types. The system should propose the wage types so that they can be removed from the Basic Pay infotype at any point in the future.

Task 2:

1. Check the LGMST feature in the IMG step: Enterprise Structure for Wage Type Model. What entry does the trainer have to make to ensure that your wage type model (HRLY##) is defaulted for your employee subgroup? A total of 5 wage types should be entered in the Basic Pay infotype.

   ____

   Hint: You do not need to make any changes in the *LGMST* feature.

2. Create a new *Basic Pay* (0008) infotype record for the personnel number 305992##. The system will now default your wage types.

   Enter your pay scale group and level, and choose *Enter*. The system will now calculate the amounts for your wage types too. You have now set up the infotype as required, and you can now *save* your entries.

Continued on next page

Task 3:

(optional)

1. Use the personnel file to check which infotypes have been created using this personnel action for employee 305992##.

Task 4:

(optional)

So far, you have set up the Basic Pay infotype. However, you require maximum control over the wage types in the Basic Pay infotype for your employee with personnel number 305992##:

1. The amounts for the wage types should be valuated indirectly, and should **not be able to be overwritten**.
2. The wage types should be defaulted permanently. In other words, these wage types cannot be changed or deleted.
3. The system should default three wage types only (##10, ##20, and ##30). You also should not be able to enter other wage types manually.
4. To check the Basic Pay infotype again, you must create a new record once more (as of the hiring date of your employee 305992##). This involves overwriting the infotypes you have already created.

Solution 16: Default Wage Types

Task 1:

1. Define a wage type model with the naming convention HRLY##. This should contain your three new customer wage types. The system should propose the wage types so that they can be removed from the Basic Pay infotype at any point in the future.

   a) *IMG: Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Revise Default Wage Types*

   b) Choose *New entries*.

   c) Create the following entries:

Wage type model	Start date	End date	Seq. no.	Mode	Wage type
HRLY##	01.01.2006	31.12.9999	1	O	##10
HRLY##	01.01.2006	31.12.9999	2	O	##20
HRLY##	01.01.2006	31.12.9999	3	O	##30

   Save your data and return to the IMG.

Task 2:

1. Check the LGMST feature in the IMG step: Enterprise Structure for Wage Type Model. What entry does the trainer have to make to ensure that your wage type model (HRLY##) is defaulted for your employee subgroup? A total of 5 wage types should be entered in the Basic Pay infotype.

Continued on next page

Hint: You do not need to make any changes in the *LGMST* feature.

a) *IMG: Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Enterprise structure for wage type model. The system displays the Process feature LGMST: decision tree screen*

b) *The system displays the Process feature LGMST: Decision tree* screen.

c) If you want to change the *LGMST feature* in tree maintenance, you must perform the following processing activities:

d) In country grouping *99*, search for the node *PERSK* and the employee group *ACTIVE*. Position the cursor on the *PERSK* node and select the function *Create nodes*. On the *Values for PERSK* screen, enter ## (## is your new employee subgroup). Then select *Transfer*.

e) Position the cursor on the new node (##) and select *Create* nodes. Accept the *Return value* default setting on the following screen and confirm by choosing Enter. Enter 05/HRLY## on the screen that then appears (*Return value for field value ##)*, and choose *Copy*.

f) After you have changed the *LGMST* feature, check the feature for errors.

g) The trainer will ***save* and *activate* the feature for you**.

2. Create a new *Basic Pay* (0008) infotype record for the personnel number 305992##. The system will now default your wage types.

   Enter your pay scale group and level, and choose *Enter*. The system will now calculate the amounts for your wage types too. You have now set up the infotype as required, and you can now *save* your entries.

   a) *Human Resources → Personnel Management → Administration → HR Master Data*

   b) Choose *Maintain*.

   c) Enter the personnel number *305992##.*

   d) Enter infotype 0008 and use the start of this month as the start date.

   e) Choose *Create*.

   f) Maintain the pay scale group and level.

   g) Choose *Enter*. The amounts are entered in the fields.

   h) Save your entries and return to the SAP Easy Access menu.

Continued on next page

Task 3:

(optional)

1. Use the personnel file to check which infotypes have been created using this personnel action for employee 305992##.

   a) *Human Resources → Personnel Management → Administration → HR Master Data → Personnel File*

   b) Enter the personnel number *305992##*.

   c) Choose *Display*.

   d) Check the infotypes using the *Next record* function.

   e) Return to the SAP Easy Access menu.

Task 4:

(optional)

So far, you have set up the Basic Pay infotype. However, you require maximum control over the wage types in the Basic Pay infotype for your employee with personnel number 305992##:

1. The amounts for the wage types should be valuated indirectly, and should **not be able to be overwritten**.

   a) *IMG: Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Check Wage Type Catalog → Check Wage Type Characteristics*

   b) Select the wage type *##10*.

   c) Choose *Details*.

   d) Make the following entries:

      - Rewritable indicator: Remove the indicator

   e) Complete the steps above for wage types ##20 and ##30 too.

   f) Save your data and return to the IMG.

Continued on next page

2. The wage types should be defaulted permanently. In other words, these wage types cannot be changed or deleted.
   a) *IMG: Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Revise Default Wage Types*
   b) Choose *New entries*.
   c) Change your entries so that mode F (fixed/permanent) is:

Wage type model	Start date	End date	Seq	Mode	Wage type
HRLY##	01.01.2006	31.12.9999	1	F	##10
HRLY##	01.01.2006	31.12.9999	2	F	##20
HRLY##	01.01.2006	31.12.9999	3	F	##30

   Save your data and return to the IMG.
3. The system should default three wage types only (##10, ##20, and ##30). You also should not be able to enter other wage types manually.
   a) *IMG: Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Wage Types → Employee Subgroups for Primary Wage Type*
   b) The system displays the *Process feature LGMST*: Decision tree screen.
   c) Change the return value of the feature for your employee to 03/HRLY##.
   d) Activate the feature and then exit it. Call up the feature again to check that the data was really saved in the feature.

Continued on next page

4. To check the Basic Pay infotype again, you must create a new record once more (as of the hiring date of your employee 305992##). This involves overwriting the infotypes you have already created.

   a) *Human Resources → Personnel Management → Administration → HR Master Data*

   b) Choose *Maintain*.

   c) Enter the personnel number *305992##.*

   d) Enter infotype 0008 and use the start of this month as the start date.

   e) Choose *Create*. The wage types are now fixed defaults, and you are now unable to add any additional lines.

   f) Maintain the pay scale group and level.

   g) Choose *Enter*. The amounts are entered in the fields, and cannot be changed.

   h) Save your entries (overwrite the infotype record you have already created), and return to the SAP Easy Access menu.

Lesson Summary

You should now be able to:

- Set wage types as defaults for an employee with the help of the LGMST feature and a wage type model, depending on the enterprise and personnel structure

Unit Summary

You should now be able to:

- Explain the meaning of wage types in SAP
- Copy wage types and know what one must pay attention to when copying wage types
- Identify the control indicators that are used to determine to whom the wage type can be assigned, when it can be assigned, and how often.
- Specify the dialog characteristics of the wage types
- Know how wage types can be valuated indirectly by the system
- Set wage types as defaults for an employee with the help of the LGMST feature and a wage type model, depending on the enterprise and personnel structure

Unit 12

Reports for Changes to Remuneration

Unit Overview

The options for performing standard pay increases and pay scale reclassifications using reports and Customizing settings are presented in this section.

Unit Objectives

After completing this unit, you will be able to:

- Set up and perform standard pay increases
- Set up rules for and perform automatic pay scale reclassification.

Unit Contents

Lesson: Reports for Changes to Remuneration

Lesson Overview

Mapping changes to remuneration using reports:

- Standard Pay Increase
- Pay Scale Reclassification

Lesson Objectives

After completing this lesson, you will be able to:

- Set up and perform standard pay increases
- Set up rules for and perform automatic pay scale reclassification.

Business Example

Now that you have made the necessary system settings in your company, you need to use the system to carry out routine tasks.

These tasks include automatically transferring an employee to another pay scale group and performing a standard pay increase.

Standard Pay Increase

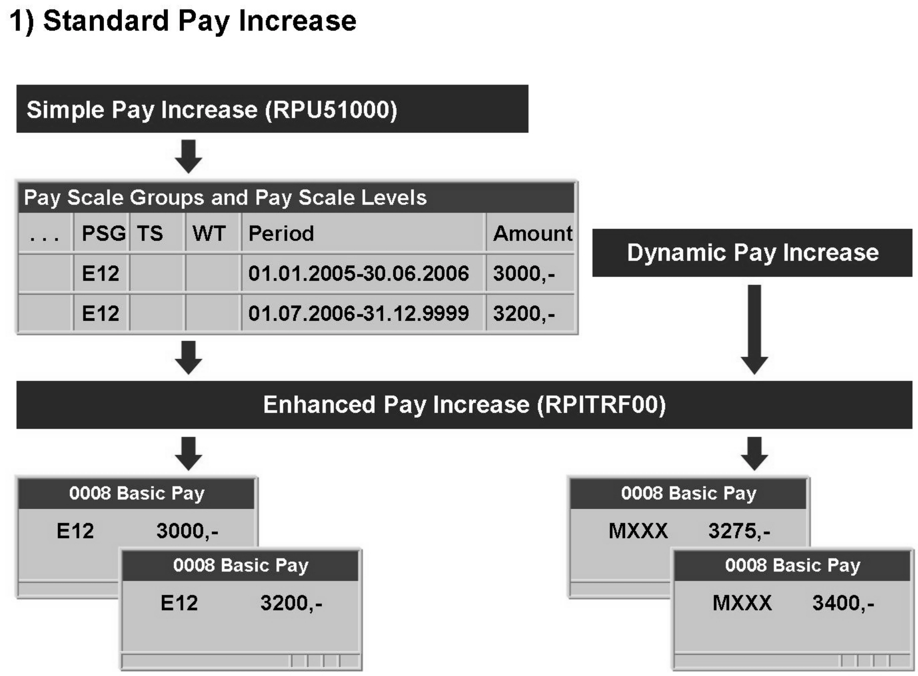


Figure 132: 1) Standard Pay Increase

The system allows you to automatically increase an employee's standard pay.

You can use this function for employees whose basic pay is determined on the basis of the pay scale structure to which they are assigned during Customizing.

Which of the two different procedures is used to determine the pay increase depends on whether the system should increase the amounts in the Customizing system by a certain amount or by a percentage, or whether the system should update the pay history in the Basic Pay infotype (0008).

Note:

- **Simple standard pay increase**: A change is made to a Customizing table (T510). This means that retroactive accounting is not automatically triggered. This may be necessary, for example, if you have retroactive increases that relate to the payroll past. In addition, simple standard pay increases do not create a new infotype record.
- **Extended standard pay increase**: If you run this pay increase, the system recognizes it as relevant for retroactive accounting and creates a new infotype record.

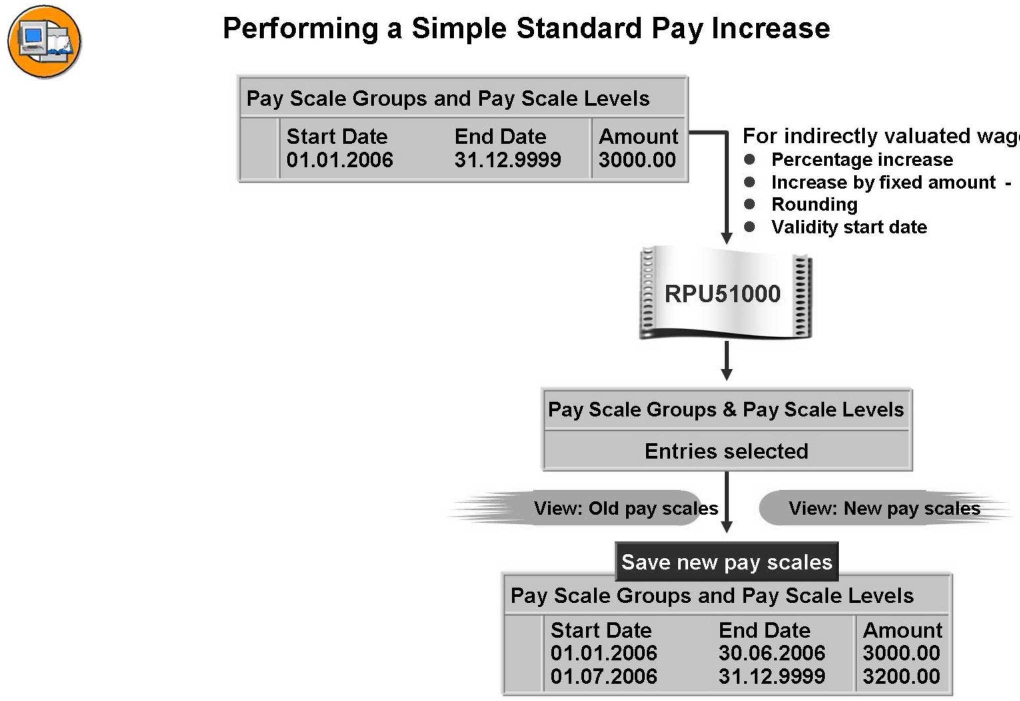


Figure 133: Performing a Simple Standard Pay Increase

When increasing an employee's pay, you must first run report RPU51000 to change the pay scale groups and levels on the key date.

The system reads the actual monetary value from the relevant table when performing indirect valuation.

If you enter a date in the "Indirect valuation" field in the Basic Pay infotype (0008), the system displays the currently valid amounts.

To facilitate processing, the activities for changing Customizing settings and master data are kept separate.

If you want to create a basic pay history (0008), run report RPITRF00 to delimit the basic pay records on the key date specified.

Performing an Enhanced Standard Pay Increase

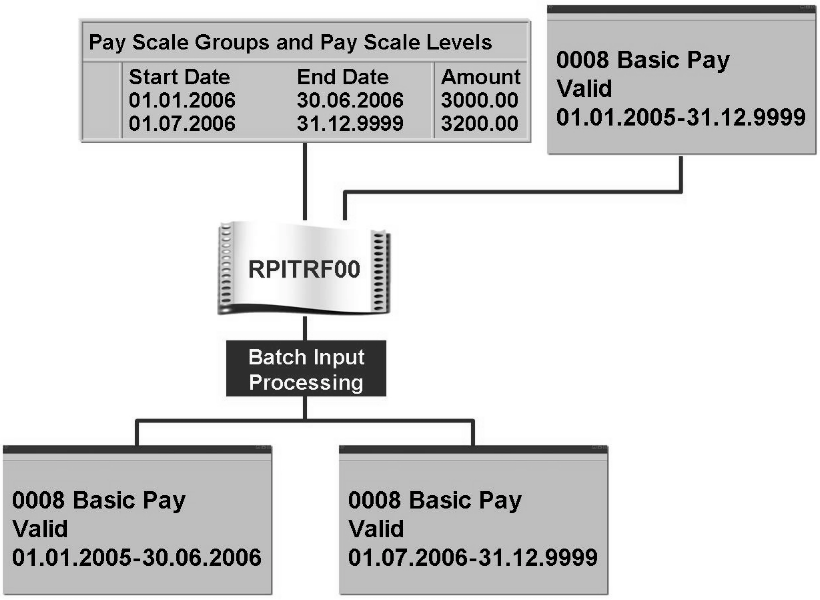


Figure 134: Performing an Enhanced Standard Pay Increase

Payroll processes the Basic Pay infotype (0008), as well as pay scale groups and levels for a specific period.

When you increase amounts by changing the settings in Customizing, the system updates the Basic Pay infotype history (0008) for indirectly valuated wage types.

You can use the **RPITRF00 report** to generate a basic pay history for a specific period of time.

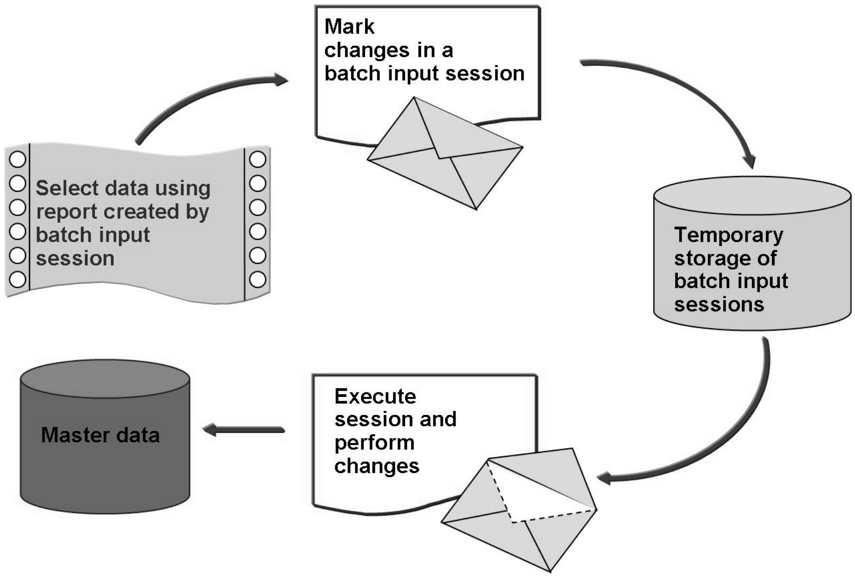


Figure 135: Batch Input Processing

Mass data changes that are triggered by reports are normally made using a batch input session and not immediately. The changes are not made to the master data until the batch input session has been processed.

To access the batch input system, choose: *System* → *Services* → *Batch Input* → *Sessions*. You can then select a session using any combination of the following criteria:

- Session name
- Creation date (according to session overview)
- Session status

Choose *Overview* to display the session overview. You can use the session overview to start, analyze or delete sessions. Choose Log to display the session log.

When each session is processed, a log is automatically created. You can use the list of session logs to carry out additional actions, for example, to analyze sessions.

You can choose from three types of processing:

- **Process online**: You can correct transactions interactively and run transactions that you have not yet executed in phases.
- **Only display errors**: This processing type is similar to processing online, the only difference is that you cannot process transactions that are free of errors and have not been executed interactively. The system displays the screen on which the error occurs.
- **Background**: This processing type schedules a session to be processed immediately in the background.

Pay Scale Reclassification

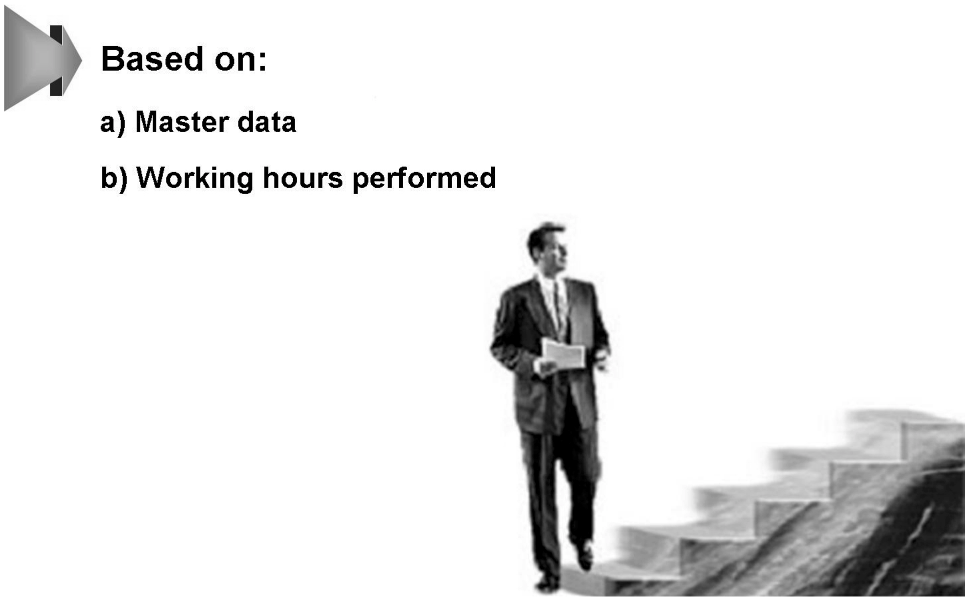


Figure 136: 2) Pay Scale Reclassification

Pay scale reclassification allows you to update the information on the pay scale groups and levels in the Basic Pay infotype (0008) for each employee. The system updates this information automatically when a situation meriting reclassification arises.

In addition to the Next Increase field in the Basic Pay infotype (0008) and the Key Date field on the report selection screen, you can define other limit values for reclassification criteria in the SAP system.

1. The age of the employee when the system is to perform a pay scale reclassification.
2. Pay scale group or level. When an employee reaches this group or level, he or she is due for reclassification.
3. The limit value for the time worked by the employee (in hours).

You can use the following reports to perform pay scale reclassification:

1. Pay scale reclassification based on master data: Pay Scale Reclassification acc. to Age or Pay Scale Membership Period (RPITUM00 report).
2. Pay scale reclassification based on hours worked: Pay Scale Reclassification (RPITIG00 report).

2a) Pay Scale Reclassification on Basis of Master Data

Pay scale group	Pay scale level	Pay scale jump due to age	Group member-ship period	Next pay scale group	Next pay scale level
GR00	01		12 months	GR00	02
GR00	02		12 months	GR00	03
E11	01	40		E11	02
E11	02	45		E11	03

Figure 137: 2a) Pay Scale Reclassification On Basis of Master Data

Pay scale reclassification means the transfer of an employee from one pay scale group and/or pay scale level to another. The employee is then paid according to the new group/level.

Automatic pay scale reclassification depends on the **employee's age** and **time** spent in a pay scale group/level.

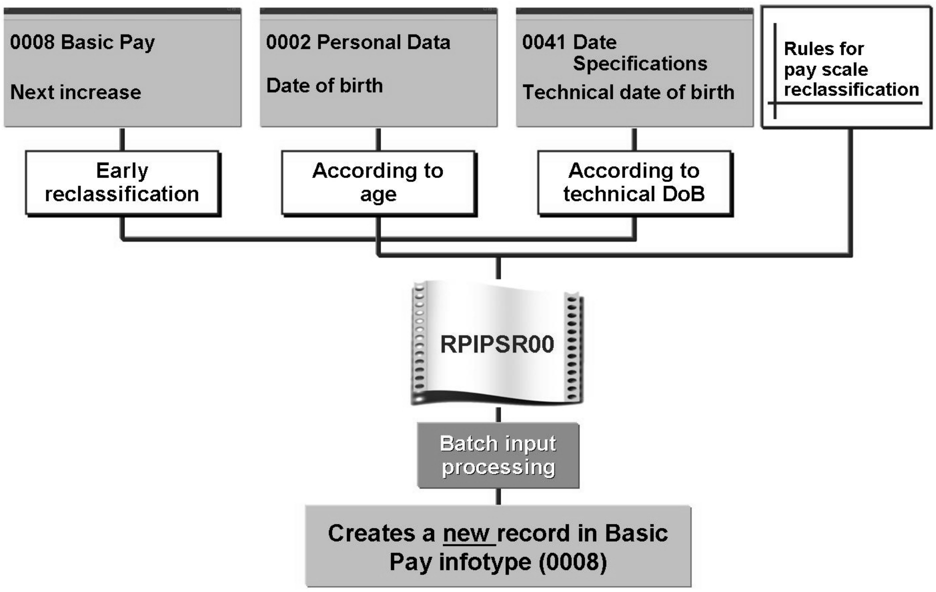


Figure 138: Performing a Pay Scale Reclassification Based on Master Data

If you want to transfer an employee to a different pay scale group/level before the set date, you can enter the new **date** in the **“Next increase”** field of the Basic Pay infotype (0008).

If you want to transfer an employee to a different group or level on the basis of age, you can enter a **natural** or **technical** date of birth to vary the time of reclassification.

The RPLTRF00 report (Time Spent in Each Pay Scale Area/Type/Group/Level) generates a list of employees, including their pay scale structure and additional information.

You usually perform pay scale reclassifications before the payroll run for each payroll period. You must perform pay scale reclassifications **before** a standard pay increase.

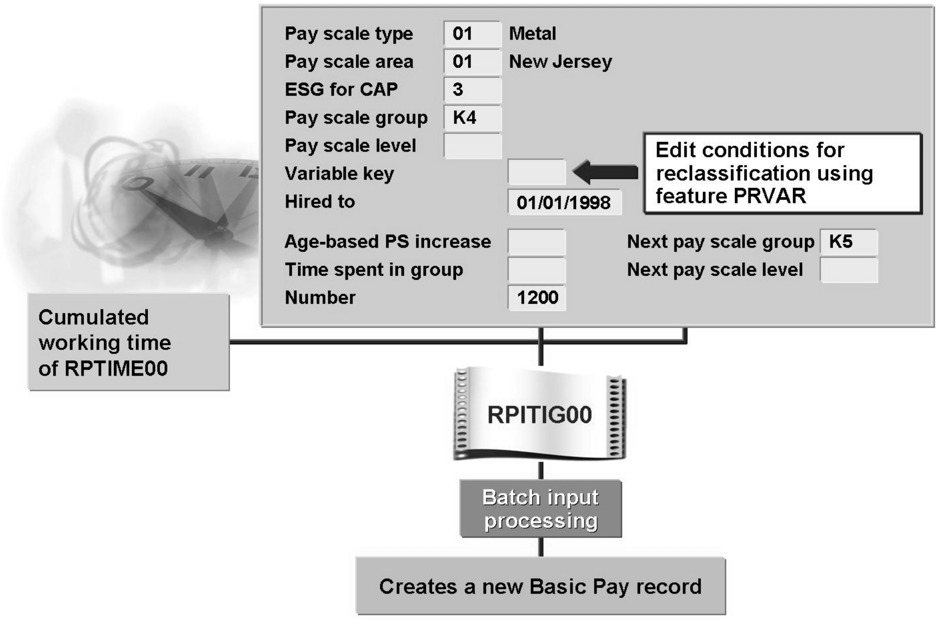


Figure 139: 2b) Pay Scale Reclassification Based on Working Time

You can only use this function if you use the Time Evaluation component.

Before you can use this function, you must define limit values for the hours worked by your employees, as well as the next pay scale group and level in the Pay Scale Reclassification table.

The Pay Scale Reclassification report, RPIPSR00, compares the limit values for hours worked with the working time that has already been cumulated (RPTIME00). If the limit values are exceeded, this report creates a new Basic Pay record (0008).

The PRVAR feature uses additional organizational and employee-related criteria to define a three-character alphanumeric return code as a variable key. The system uses this key to read the pay scale reclassification table.

Exercise 17: Reports for Changes to Remuneration

Exercise Objectives

After completing this exercise, you will be able to:

- Perform standard pay increases and pay scale reclassifications

Business Example

All production employees are to receive a standard pay increase of 5%, effective immediately. In addition, when the employees have been in a pay scale level for a year, they are eligible for reclassification to the next level.

Task 1:

Perform a standard pay increase:

1. After you have made sure that you have saved a Basic Pay infotype with indirectly valuated wage types for your Production Employee 305992##, use report RPU51000 to increase the standard pay by 5% for pay scale type 90 and pay scale area 70+## as of today. This will increase the amounts in the pay scale table.
2. Use report RPITRF00 for your employee subgroup **##** and **for the current date**. Ensure that the country grouping is set to **99** (Other countries). Set the **indicator for the batch input** session, and then process the session.

   This will create a new infotype record as of today (date of standard pay increase) for employee 305992##. Take a look at the Basic Pay infotype record for your employee.

Task 2:

Perform a pay scale reclassification **(optional)**:

1. Use the IMG step *Define Pay Scale Reclassification Based on Master Data* to define the general rules for reclassification in your company. After one year, employees in your pay scale group GR## should be moved into the next level.

   Note: In certain circumstances, you can only find this step in the SAP Reference IMG.
2. A year has now passed, and your production worker (personnel number 305992##) is to be assigned to the next pay scale level. Use the report RPIPSR0 to automatically generate this change. Set the indicator for the batch input session, and then process the session.

Continued on next page

3. Check the Basic Pay infotype (0008) to ensure that the pay scale reclassification was carried out successfully.

Solution 17: Reports for Changes to Remuneration

Task 1:

Perform a standard pay increase:

1. After you have made sure that you have saved a Basic Pay infotype with indirectly valuated wage types for your Production Employee 305992##, use report RPU51000 to increase the standard pay by 5% for pay scale type 90 and pay scale area 70+## as of today. This will increase the amounts in the pay scale table.

   a) Simple standard pay increase: Use report RPU51000 to increase the standard pay by 5% for pay scale type 90 and pay scale area 70+## as of today. This will increase the amounts in the pay scale table.

   b) In the *System* menu, choose *Services* → *Reporting*

   c) Enter report RPU51000. Choose *Execute*.

   d) Enter country grouping 99, pay scale type *90*, pay scale area *70+##*, EESGGrpg for Coll.Agrmt.Prov. *1*, the percentage rate 5% and the current date as the validity begin date.

   e) Choose *Execute*.

   f) To check your entries, choose *View of old pay scales* and *View of new pay scales*. Now choose *Save new pay scales*.

   g) Return to the SAP Easy Access menu.

2. Use report RPITRF00 for your employee subgroup ## and **for the current date**. Ensure that the country grouping is set to **99** (Other countries). Set the **indicator for the batch input** session, and then process the session.

Continued on next page

This will create a new infotype record as of today (date of standard pay increase) for employee 305992##. Take a look at the Basic Pay infotype record for your employee.

a) Enhanced Standard Pay Increase: Use report RPITRF00 for your employee subgroup **##** and **for the current date**. Ensure that the country grouping is set to **99** (*Other countries*). Set the **indicator for the batch input** session, and then process the session.

b) In the *System* menu, choose *Services* → *Reporting*

c) Enter report RPITRF00.

d) Choose Execute.

e) Enter your employee subgroup (##) and the **current date** as the date for the increase. Enter **99** *Other countries* as the country grouping. Set the **indicator for batch input**.

f) Choose *Execute*.

g) To run the session, choose *System* → *Services* → *Batch input* → *Sessions*.

h) On the *General Overview* tab page, select the batch input session next to your logon ID (HR305-##), and choose *Process*. On the next screen, select *Process online*. Confirm each individual step with *Enter*.

i) Check the change in your employee's master data. The system has created an additional infotype record, valid from today.

j) Return to the SAP Easy Access menu.

Task 2:

Perform a pay scale reclassification **(optional)**:

1. Use the IMG step *Define Pay Scale Reclassification Based on Master Data* to define the general rules for reclassification in your company. After one year, employees in your pay scale group GR## should be moved into the next level.

Continued on next page

Note: In certain circumstances, you can only find this step in the SAP Reference IMG.

a) *IMG: Personnel Management → Personnel Administration → Payroll Data → Basic Pay → Pay Scale Changes → Pay Scale Reclassification → Specify Pay Scale Reclassification*

b) Choose *New entries*, and create the following entries:

c) Pay Scale Type *90*, Pay Scale Area *70+##*, Pay Scale Group *1*, Pay Scale Group *GR##*, Level *01*, Start *Beginning of current month*, End *31.12.9999 (high date)*, Time spent in a pay scale group *12*, Next Pay Scale Group *GR##*, Next Pay Scale Level *02*.

d) Pay Scale Type *90*, Pay Scale Area *70+##*, Pay Scale Group *1*, Pay Scale Group *GR##*, Level *02*, Start *Beginning of current month*, End *31.12.9999 (high date)*, Time spent in a pay scale group *12*, Next Pay Scale Group *GR##*, Next Pay Scale Level *03*.

e) Pay Scale Type *90*, Pay Scale Area *70+##*, Pay Scale Group *1*, Pay Scale Group *GR##*, Level *03*, Start *Beginning of current month*, End *31.12.9999 (high date)*, Time spent in a pay scale group *12*, Next Pay Scale Group *GR##*, Next Pay Scale Level *04*.

2. A year has now passed, and your production worker (personnel number 305992##) is to be assigned to the next pay scale level. Use the report RPIPSR0 to automatically generate this change. Set the indicator for the batch input session, and then process the session.

   a) In the *System* menu, choose *Services → Reporting*

   b) Enter report RPIPSR00, and choose *Execute*. Select *Other period*, and enter the first and last day of the current month **next** year, as well as your personnel number (305992##). On the *Generation Type* tab page, select the *Batch Input Session* option.

   c) Choose *Execute*.

   d) To run the session, choose *System → Services → Batch input → Sessions*.

   e) On the *General Overview* tab page, select the batch input session next to your logon ID (HR305-##), and choose *Process*. On the next screen, choose *Process online*, and deselect the indicator for *Standard screen size*. Confirm each individual step with *Enter*.

   f) Return to the SAP Easy Access menu.

Continued on next page

3. Check the Basic Pay infotype (0008) to ensure that the pay scale reclassification was carried out successfully.

   a) *Human Resources→ Personnel Management → Administration → HR Master Data*

   b) Select *Display*.

   c) Enter the personnel number 305992##.

   d) Enter infotype 0008.

   e) Select *Overview*.

   f) Check the pay scale group and level.

Lesson Summary

You should now be able to:

- Set up and perform standard pay increases
- Set up rules for and perform automatic pay scale reclassification.

Unit Summary

You should now be able to:

- Set up and perform standard pay increases
- Set up rules for and perform automatic pay scale reclassification.

Unit 13

Infotypes

Unit Overview

To begin with, the general methods of controlling infotypes are demonstrated in this section. The ways of modifying the screen header and screen are then explored. Finally, the option of calling the infotype using the infotype menu is examined.

Unit Objectives

After completing this unit, you will be able to:

- Describe what controls are available through infotype configuration
- Define fields relevant for retroactive accounting
- Explain what controls are available for the country infotype views
- Customize the user interface of the infotype under Screen Header
- Customize the user interface of the infotype under Screen Modification
- Create new infotype menus and process existing infotype menus
- Provide infotype menus as a tab page in the personnel master data maintenance of selected users

Unit Contents

Lesson: Infotype Attributes

Lesson Overview

Infotype Attributes

- Time constraint
- Fields relevant for retroactive accounting
- Country-specific infotypes

Lesson Objectives

After completing this lesson, you will be able to:

- Describe what controls are available through infotype configuration
- Define fields relevant for retroactive accounting
- Explain what controls are available for the country infotype views

Business Example

You want to find out about the possibilites of configuring infotype attributes.

Entering Infotypes

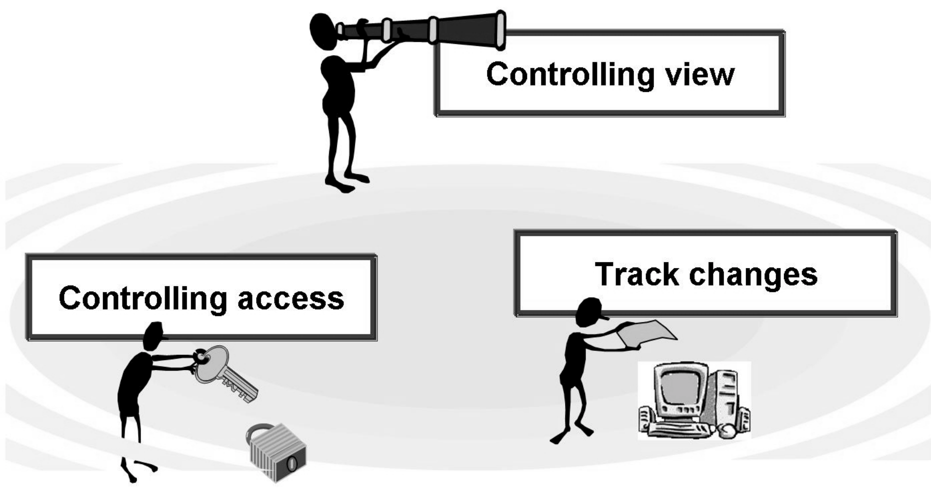


Figure 140: System Controls

There are different levels of user control.

- The first level of control of the **Controlling View** is what the user sees on the screen and menus, and what information is readily and easily available for the user to view. Additionally, there are controls for what information may be appropriate for data entry for certain employees, for example, country-specific infotypes.
- A second level of control is authorizations (**Controlling Access**) - what the user can access (see the HR940 course).
- And finally, the third level of control, **Track Changes**, involves tracking what changes are made (or what reports are run) (see appendix).

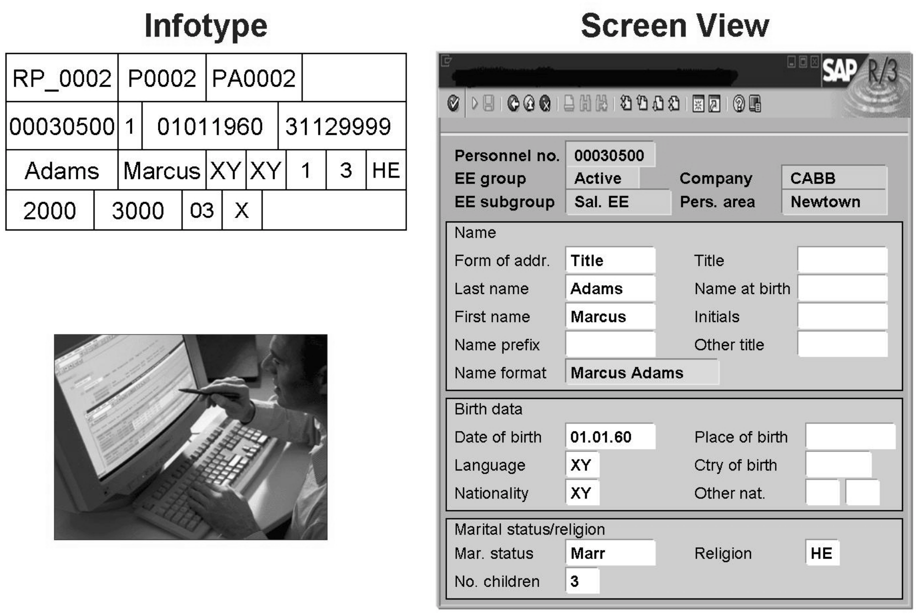


Figure 141: 1) Infotype Attributes

Infotype: A set of data grouped together into areas with similar content, for example, personal data, planned working time, organizational assignment, basic pay.

From a technical point of view, the structure of infotypes reflects a data grouping and can be identified by a four-digit key. Infotypes are also carriers of system control features, for example, time constraints, retroactive accounting relevance, and so on.

Screen view: The users see infotypes as input templates with which they can maintain the infotype records. A screen (or **DYN**amic **PRO**gram) consists of a screen and the accompanying flow logic. The main elements of a screen are:

- Attributes (for example, screen number, following screen)
- Layout (the arrangement of texts, fields, and other elements)
- Field attributes (definition of the properties of individual fields)
- Flow logic (calls the relevant ABAP modules)

In the mySAP ERP 2005 system, a specific screen may consist of data from one, two, or several infotypes.

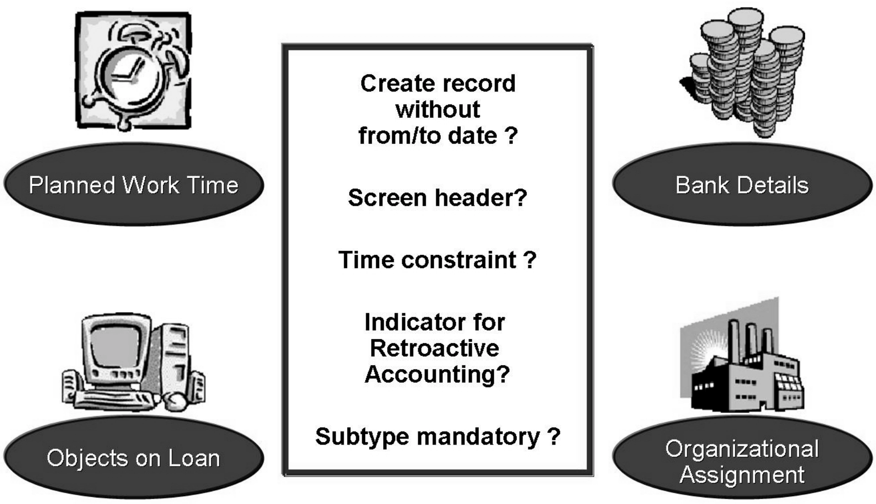


Figure 142: Configuring Infotypes

Data fields containing HR master data, time management data, and applicant data are grouped together for creating infotypes.

Infotypes are subject to the following naming conventions:

- Infotypes 0000 to 0999 for HR master data and certain applicant data
- Infotypes 1000 to 1999 for HCM planning data
- Infotypes 2000 to 2999 for time management data
- Infotypes 4000 to 4999 for applicant-only data
- Infotypes 9000 to 9999 are reserved for customers.

You can assign the system response for each individual infotype.

Information on dialog control, sort sequence, header layout, and so on can be specified for each infotype.

Infotype Control

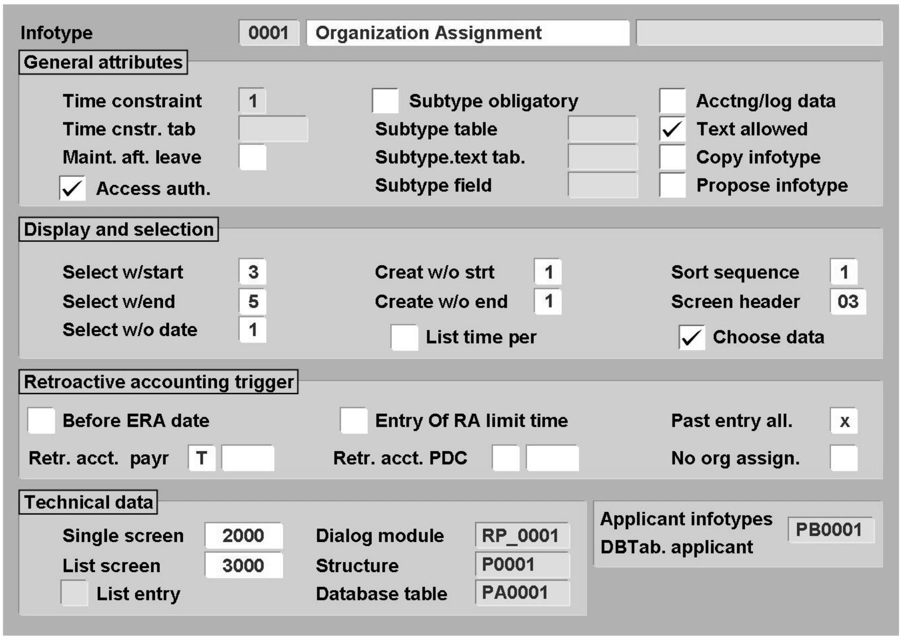


Figure 143: Infotype Control

The SAP standard system contains all infotypes and their default settings. This system is fully executable. If you adapt the system to meet your specific requirements, you must make a distinction between customer parts that you may customize and SAP parts that you may not change under any circumstances.

Fields Relevant for Retroactive Accounting

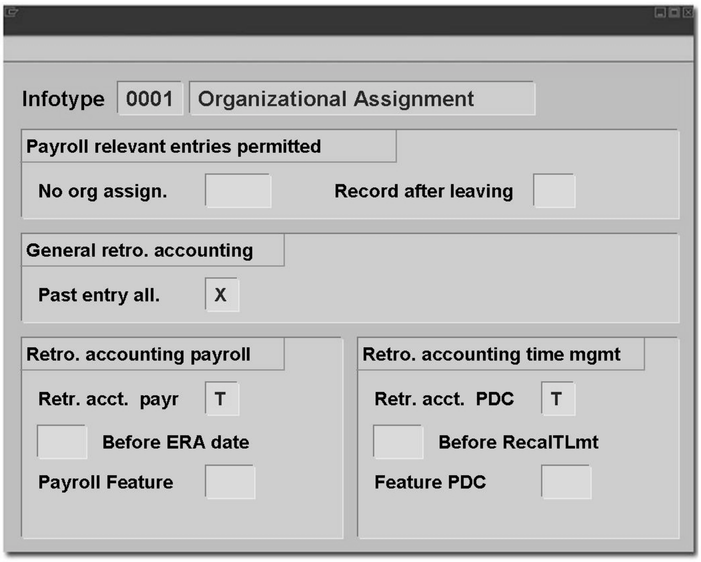


Figure 144: Defining Fields Relevant for Retroactive Accounting

You can define the retroactive accounting relevance of infotypes for Payroll and Time Management. Relevant infotypes are defined for retroactive accounting for payroll and time management in the customizing step *Define Fields Relevant for Retroactive Accounting* in the following ways:

- You can make the settings for Payroll and Time Management entirely independent of one another. If you set an infotype as relevant for field-dependent retroactive accounting, you must list the fields of the infotype in the *Field-Dependent Retroactive Accounting Recognition* view. An infotype can be defined in terms of a field as relevant for retroactive accounting with the *Field-Specific Retroactive Accounting Attributes*.

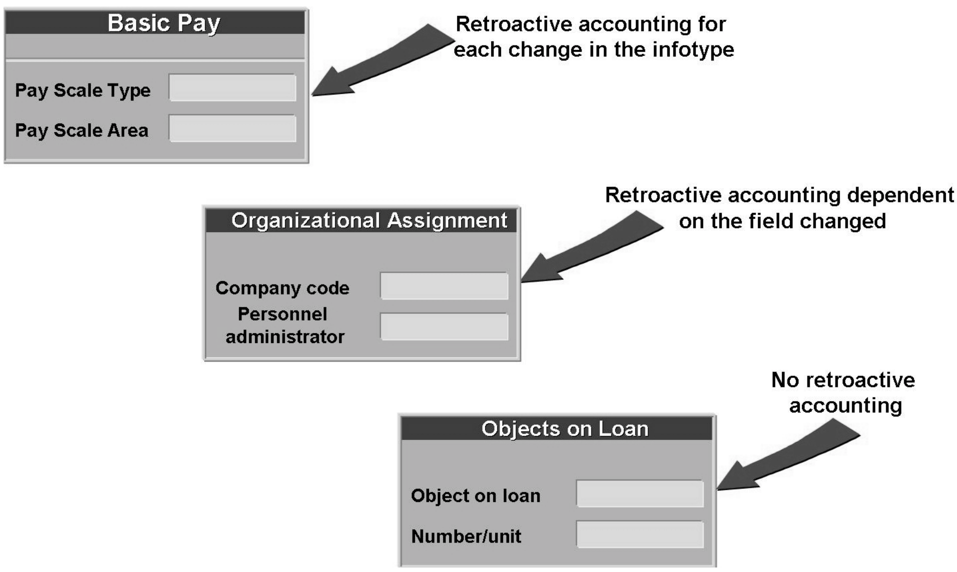


Figure 145: Retroactive Accounting Infotype and Field Triggers

You can indicate infotypes or infotype fields as being relevant for retroactive accounting. Fields (T) can be indicated as being relevant for retroactive accounting.

Fields relevant for retroactive accounting - if the relevance for retroactive accounting for the payroll field was set to *T* (field-dependent), you must list the fields which trigger the retroactive run for payroll in the *Field-Dependent Retroactive Accounting Recognition* view.

Enter the value 1 for these fields in the *Type* field. If the Retroactive accounting relevance for PDC time evaluation field is set to T (field-dependent), you must list the fields which trigger retroactive accounting of time data in the V_T588G view. Enter the value 2 for these fields in the *Type* field. You can choose the setting *Cannot be changed in the payroll past* for certain fields. Such a setting could, for example, be used for transfer data, since a retroactive change for such data would not make any sense.

Country-Specific Infotypes

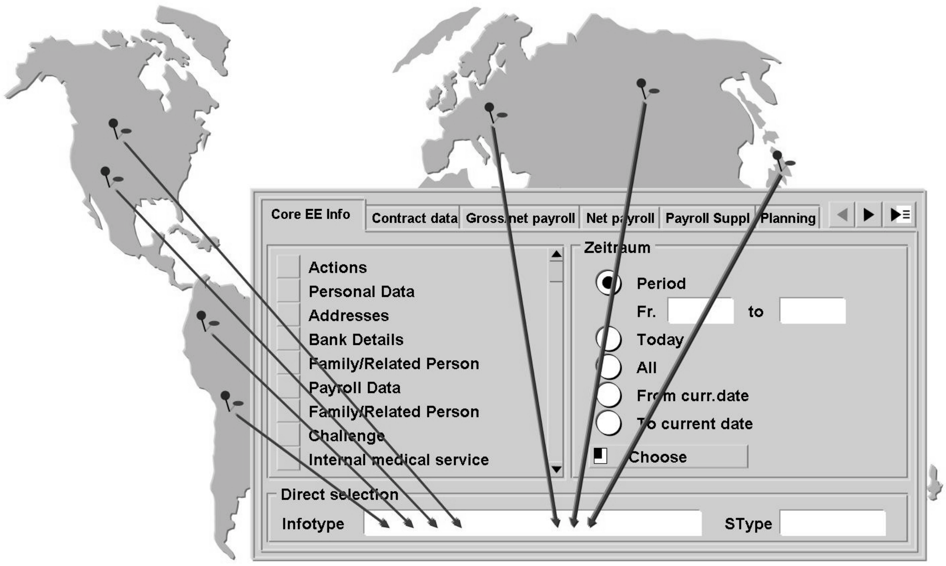


Figure 146: Country-Specific Infotypes and Subtypes

You can specify the permissibility of infotypes for countries. If the country-dependent subtypes indicator is set for the infotype, you can also specify the permissibility of subtypes for an infotype for countries.

Currently, this indicator can only be reported for infotypes whose subtypes are defined in the Info-subtype attributes view.

In the *Display Personnel Master Data* (PA20) and *Maintain Personnel Master Data* (PA30) transactions, the infotypes with a country grouping of personnel numbers are checked. This means that only the infotypes and subtypes which are approved for the country groupings are displayed in the *Infotypes - Country-Specific Settings* view.

Example:
The infotype 0224 stands for the *Canadian Taxation* infotype and is distinguished as being exclusively valid for Canada in the configuration. If an existing personnel number is entered in the personnel number field in the *Maintain Master Data* view, the system determines whether the employee belongs to a Canadian company code (based on record IT0001). If the employee does not belong to a Canadian Company code, infotype 0224 cannot be maintained and will not be visible in the pull-down selection for infotypes.

Exercise 18: Infotype Attributes

Exercise Objectives

After completing this exercise, you will be able to:

- Describe what controls are available through infotype configuration.
- Define fields relevant for retroactive accounting.

Business Example

You want to familiarize yourself with infotype attributes.

Task 1:

Use the infotype assigned to your group:

Group	Infotype Assignment	Group	Infotype Assignment
00	0007	16	0050
01	0009	17	0031
02	0105	18	0004
03	0022	19	2050
04	0015	20	2051
05	0027	21	2001
06	0002	22	2002
07	0014	23	2003
08	0008	24	2004
09	0017	25	2005
10	0019	26	2006
11	0040	27	2007
12	0041	28	2010
13	0077	29	2012
14	0001	30	2013
15	0016		

Continued on next page

Use the infotype assigned to your group on the data sheet to find information regarding the fields used to configure infotype characteristics. Note that answers are dependent on your infotype and specific answers can be achieved using F1 Help.

Answer the following questions about your infotype's attributes:

1. What time constraint does your infotype have?

2. What are the default start and end dates when this infotype record is created?

3. Is this infotype also used for applicants? Yes / No?

Task 2:

Do the following exercises:

Answer these Retroactive Accounting questions regarding your infotype.

1. Is Retroactive Payroll Accounting triggered by changes to this infotype? Yes / No?

Continued on next page

2. Is Retroactive Time Accounting triggered by changes to this infotype? Yes / No?

Solution 18: Infotype Attributes

Task 1:

Use the infotype assigned to your group:

Group	Infotype Assignment	Group	Infotype Assignment
00	0007	16	0050
01	0009	17	0031
02	0105	18	0004
03	0022	19	2050
04	0015	20	2051
05	0027	21	2001
06	0002	22	2002
07	0014	23	2003
08	0008	24	2004
09	0017	25	2005
10	0019	26	2006
11	0040	27	2007
12	0041	28	2010
13	0077	29	2012
14	0001	30	2013
15	0016		

Use the infotype assigned to your group on the data sheet to find information regarding the fields used to configure infotype characteristics. Note that answers are dependent on your infotype and specific answers can be achieved using F1 Help.

Answer the following questions about your infotype's attributes:

1. What time constraint does your infotype have?

   Answer: IMG: *Personnel Management → Personnel Administration → Customizing Procedures → Infotypes → Infotypes*

   In the Choose Activity screen, select the *Infotype* option. Select the infotype assigned to your group by double clicking it or highlighting the infotype and selecting the *Details* icon.

Continued on next page

Field: Time Constraint

Meaning of values:

1:

An infotype record must be available at all times. This record may have no time gaps. You may not delete the record last stored on the database because all records of this infotype would otherwise be deleted.

2:

Only one record may be available at one time, but time gaps are permitted.

3:

Any number of records may be valid at one time, and time gaps are permitted.

A

Only one record may ever exist for this infotype. It is valid from January 1, 1800 to December 31, 9999. Splitting is not permitted. Infotypes with the time constraint **A** may not be deleted.

B

Only one record may ever exist for this infotype. It is valid from January 1, 1800 to December 31, 9999. Splitting is not permitted. Infotypes with the time constraint **B** may be deleted.

T:

The time constraint varies depending on the subtype (see Table 591A).

Go to table maintenance (transaction SM30) and enter the table V_T591A. Alternatively, you can choose transaction PM01 (Copy infotype) to call the 591A table. In this case, enter the infotype number, then follow the menu path *Goto → Subtype characteristics.*

Z:

Refers to time management infotypes. The time constraint for these infotypes depends on the time constraint class defined in view V_T554S_I .

2. What are the default start and end dates when this infotype record is created?

   Answer:

   See field: *Create w/o strt*

   See field: *Create w/o end*

3. Is this infotype also used for applicants? Yes / No?

   Answer: See field: *Applicant DBTab*

   There is a value in this field if the infotype is used in Recruitment.

Continued on next page

Task 2:

Do the following exercises:

Answer these Retroactive Accounting questions regarding your infotype.

1. Is Retroactive Payroll Accounting triggered by changes to this infotype? Yes / No?

   Answer: IMG: *Personnel Management → Personnel Administration → Customizing Procedures → Infotypes → Infotypes*

   In the *Choose Activity* screen, select the *Infotype* option. Select the infotype assigned to your group by double clicking it or highlighting the infotype and selecting the *Details* icon.

   See field: *Retr. acct. payr.* has the value *blank, R* or *T*.

2. Is Retroactive Time Accounting triggered by changes to this infotype? Yes / No?

   Answer: See field: *Retr. acct. PDC* has the value *blank, R* or *T*.

Lesson Summary

You should now be able to:

- Describe what controls are available through infotype configuration
- Define fields relevant for retroactive accounting
- Explain what controls are available for the country infotype views

Lesson: Customizing the User Interfaces

Lesson Overview

Customizing the user interfaces of infotypes

- Infotype screen headers
- Screen modification

Lesson Objectives

After completing this lesson, you will be able to:

- Customize the user interface of the infotype under Screen Header
- Customize the user interface of the infotype under Screen Modification

Business Example

You should create a new screen header for an infotype in your company.

You should then become acquainted with the subject of screen modification.

Screen Headers

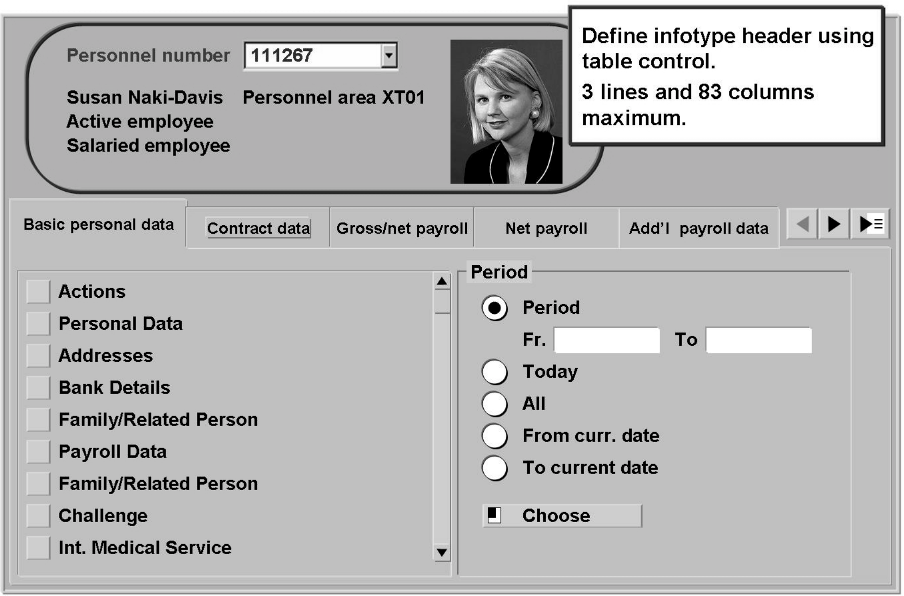


Figure 147: 2) Customizing User Interfaces: Screen Headers

The screen header consists of the first three lines displayed on single and list screens.

In the standard ERP system, a screen header is already assigned to each infotype. The system also contains information about whether the data about the system date or the start date of the *Organizational Assignment* infotype is valid. Each screen header is assigned a modifier which depends on the transaction class (A = Personnel Administration, B = Recruitment).

You can change the screen header, that is, you can customize the first three lines. Up to and including Release 4.0, you can display data from the following infotypes: *Organizational Assignment* (0001), *Personal Data* (0002), *Planned Working Time* (0007), and *Basic Pay* (0008). As of Release 4.5, you can display data from any infotype, including customer infotypes.

Passport Photos – In addition to any infotype fields you can also include passport photos of your employees in the *Infotype Header Definition* view. Determine the document type in the system table (T77S0) with which you want to create passport photographs in the visual archive.

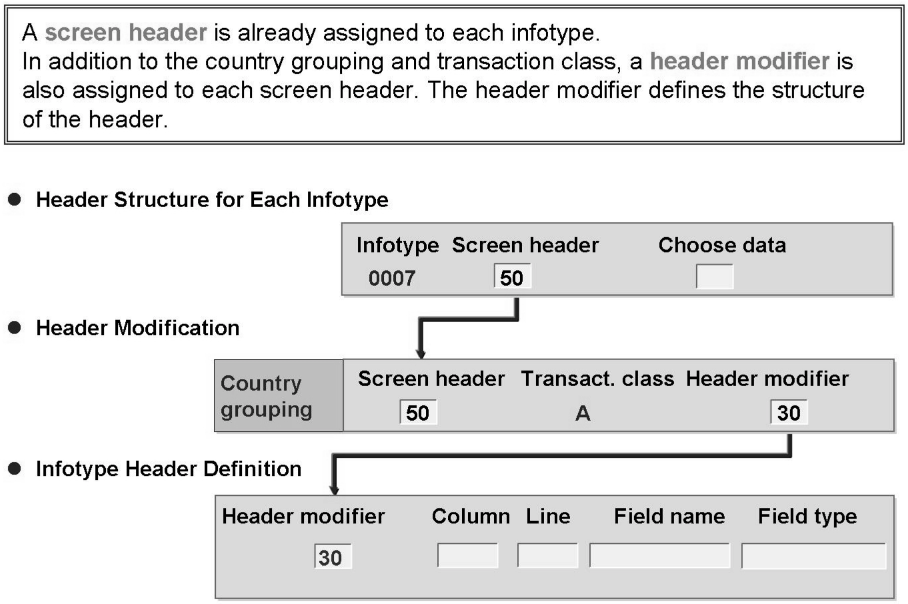


Figure 148: Customizing the User Interface: Defining Headers

In the *Header Structure for Each Infotype* view, a header is already assigned to each infotype. With the *Choose Data* indicator, you define the selection time for the selection of data from the different infotypes used in the creation of the infotype header. If you set the *Choose Data* indicator, the valid data on the start date of the infotype record that is currently being processed or displayed is used to create the infotype headers. If you do not set the *Choose Data* indicator, the data valid for the system date is used for creating the infotype headers.

Depending on the transaction class ("A" = Personnel Administration, "B" = Recruitment) and the country grouping, a header modifier is assigned to this infotype header in the *Header Modification* view (V_T588I).

In the *Infotype Header Definition* view, specify the name and positions for the field contents to be displayed in the header. The field type controls how the fields are formatted when used in the infotype headers.

Save the table entries. The */1PAPAXX/HDR_mmmnnc* reports are now generated, where 'mmm' is the client, 'nn' is the header modifier, and “c”is the transaction class.

Screen Modifier

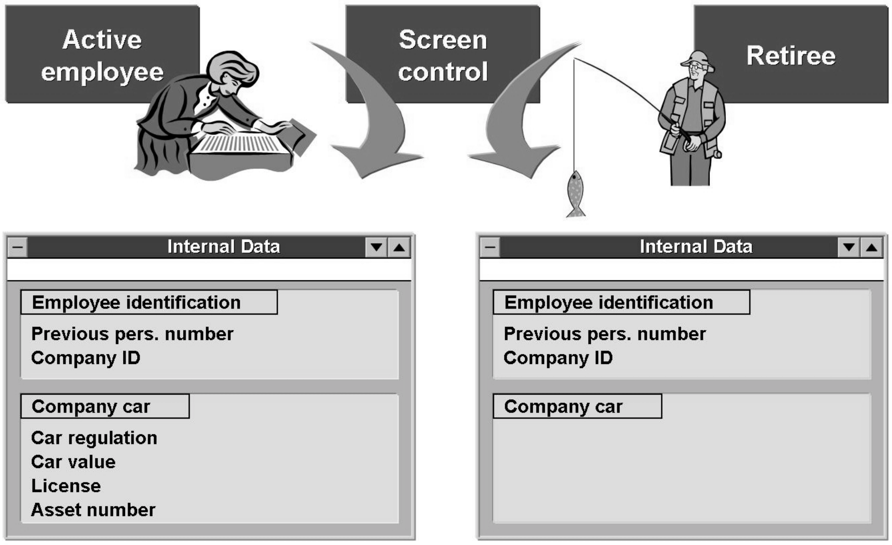


Figure 149: Customizing the User Interface: Screen View

Different entry screens are delivered for some infotypes. These alternative screens are already predefined by SAP using the transaction class and country grouping. A different screen can be used for different transaction classes (“A” for employee, “B” for applicant) or country groupings. You can also modify the attributes of the individual fields within a screen. For example, you can define fields as mandatory fields or hide all unnecessary fields. You may want to suppress field attributes in accordance with certain employee control data.

The screen modification procedure is the same for both employees and applicants.

In order to define the screen view, you need to know the name of the infotype module pool and the screen number. To display this information, call up the infotype maintenance transaction and choose *System → Status*.

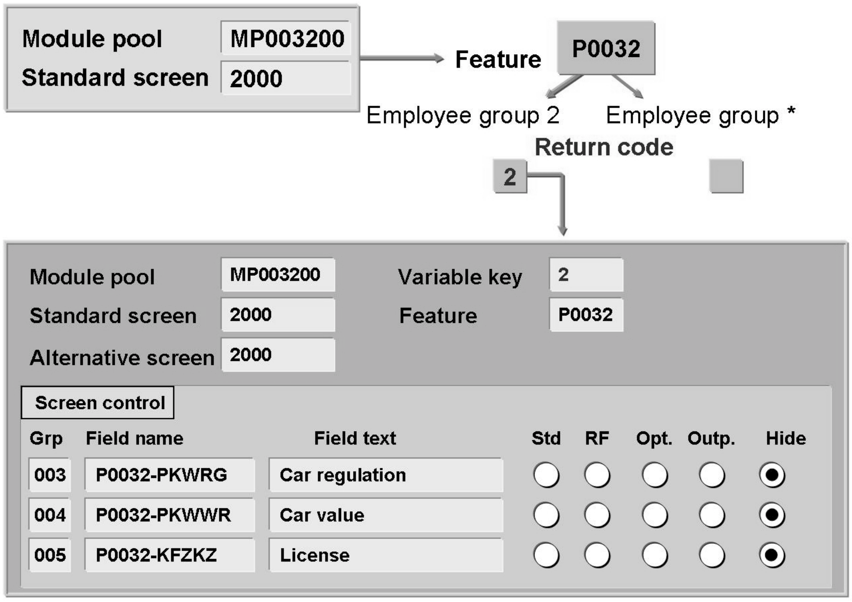


Figure 150: Customizing the User Interface: Screen Modification

You can change the attributes of the individual screen fields in the *Change Screen Modifications* step.

Find the entry for the current screen. On the detail screen, specify which fields should be modified. Among the field attributes that can be specified are: standard, required, optional, cannot be maintained and hidden.

If you need a modified screen but cannot find an entry in this view, create a new entry for the screen, making sure that the *Variable key* field is empty.

If the screen modifications for the infotypes should be generally applicable, you do not require a feature or any additional entries in this view.

As in this example, the screen modification can be based on the organizational assignment for the employee. The modification is determined by feature “Pnnnn” (nnnn = infotype number). If you do not enter a return value for the feature in the decision tree, the entry whereby the Variable key field remains empty is automatically valid - in other words, the basic entry (basic screen). If no feature is available for the infotype in question, you must create it.

Make a new entry with the return value in the variable key for each return value of the feature. Assign the number of an alternative screen, if applicable. The screen modification in the detail screen now applies to the alternative screen.

Exercise 19: Customizing User Interfaces – Screen Headers

Exercise Objectives

After completing this exercise, you will be able to:

- define an infotype header

Business Example

Your company wants a specific header on your infotype. This header should have the following information: Personnel Number, Employee Name, Personnel Area, Employee Group and Employee Subgroup.

Task 1:

Create a new header for your infotype (see table).

Hint: Before you start the exercise, create a record for your employee 540991##, Winnie Chung, for your infotype.

Easy Access Menu: *Human Resources → Personnel Management → Administration → HR Master Data → Maintain.*

In the *Personnel number* field, enter employee number 540991## (Winnie Chung), and in the *Infotype* field, enter your infotype number. Choose *Create*. Depending on the infotype you are editing, you may also have to select a subtype.

Note the sequence of fields in the header.

Choose *Cancel* (you do not have to save the infotype).

1. Assign your infotype a new screen header. Assign the number ## +50 to your screen header (so group 01 will be 51 and group 12 will be 62). Use the data valid at the start date of the infotype to build the header.
2. Define a new header modifier ##+*30* for your screen header ##+50. This header modifier should only apply to employees, that is, to transaction class A.
3. Create a definition for your header with the following structure:

Continued on next page

	Descrip-tion	Field contents	Field Text	Descrip-tion	Field con-tents	Field Text
Line 1	Name	Winnie Chung				
Line 2	Employee group	1	Active	Personnel area	CABB	CAB Com-pany
Line 3	Personnel number	540991##				

All fields of the *Organizational Assignment infotype* (0001) should be read. Use the DD1 or DD2 field type for the name (in other words, the short field text or middle field text for the field), the DAT field type for the field contents, and finally the DTX field type for the field content text.

Copy these values from the header modification 00, since this modification has similar fields, which you can add to if necessary.

You can save these entries, but do **not generate**.

4. Try to create a new infotype for your employee 540991## for today (you do not have to save the infotype) and note the changed header.

Task 2:

Do the following task: **(optional)**

1. How would you hide a field of your choice in the screen area for all employees?

Hint: For this, you must first determine the program (screen) and the screen number of your infotype.

Then, you must make the changes in Customizing. Do not actually make these changes.

Solution 19: Customizing User Interfaces – Screen Headers

Task 1:

Create a new header for your infotype (see table).

Hint: Before you start the exercise, create a record for your employee 540991##, Winnie Chung, for your infotype.

Easy Access Menu: *Human Resources → Personnel Management → Administration → HR Master Data → Maintain.*

In the *Personnel number* field, enter employee number 540991## (Winnie Chung), and in the *Infotype* field, enter your infotype number. Choose *Create*. Depending on the infotype you are editing, you may also have to select a subtype.

Note the sequence of fields in the header.

Choose *Cancel* (you do not have to save the infotype).

1. Assign your infotype a new screen header. Assign the number ## +50 to your screen header (so group 01 will be 51 and group 12 will be 62). Use the data valid at the start date of the infotype to build the header.

   a) IMG: *Personnel Management → Personnel Administration → Customizing User Interfaces → Change Screen Headers*

   b) Choose *Header Structure for Each Infotype*.

   c) In the line for your infotype, enter the value ##+50 in the *Screen header* field. Check that the *Choose data* indicator is set. This ensures that the values valid on the start date of the infotype record are displayed in the header.

   d) Choose Back to return to the list of infotype header activities.

Continued on next page

2. Define a new header modifier *##+30* for your screen header ##+50. This header modifier should only apply to employees, that is, to transaction class A.

   a) In the *Choose Activity* dialog box, select Header modification.

   b) Select *New entries*.

   c) Enter the following values:

Screen Header	Transaction Class	Header Modification
##+50	A	## + 30

   d)

   Hint: You can use different header modifiers for each screen header for applicants and employees.

   Save the values and return to the list of infotype header activities.

3. Create a definition for your header with the following structure:

	Descrip-tion	Field contents	Field Text	Descrip-tion	Field con-tents	Field Text
Line 1	Name	Winnie Chung				
Line 2	Employee group	1	Active	Personnel area	CABB	CAB Com-pany
Line 3	Personnel number	540991##				

All fields of the *Organizational Assignment infotype* (0001) should be read. Use the DD1 or DD2 field type for the name (in other words, the short field text or middle field text for the field), the DAT field type for the field contents, and finally the DTX field type for the field content text.

Copy these values from the header modification 00, since this modification has similar fields, which you can add to if necessary.

Continued on next page

You can save these entries, but do **not generate**.

a) Choose Infotype Header Definition.

b) The aim is for the following entries to be displayed:

Header modification	Line	Column	IT	Type	Field Name	Field type
## + 30	1	01	0001		ENAME	DD1
## + 30	1	14	0001		ENAME	DAT
## + 30	2	01	0001		PERSG	DD2
## + 30	2	14	0001		PERSG	DAT
## + 30	2	17	0001		PERSG	DTX
## + 30	2	33	0001		WERKS	DD1
## + 30	2	46	0001		WERKS	DAT
## + 30	2	51	0001		WERKS	DTX
## + 30	3	01	0001		PERNR	DD2
## + 30	3	14	0001		PERNR	DAT

c) With the cursor, select suitable lines in the table for the header modification 00.

d) Choose *Copy*.

e) In the *Header modification* field in each line to be copied, enter your header modification value ## +30 (where ## is your group number). Choose *Enter* and *Save*.

f) If necessary, select *New Entries* to add missing lines.

g) Save the entries you have made.

Caution: Do not generate any headers yourself. You may destroy or damage the data of other course participants.

Continued on next page

4. Try to create a new infotype for your employee 540991## for today (you do not have to save the infotype) and note the changed header.
   a) Create a record of your infotype for your employee 540991##, Winnie Chung.
   b) SAP Easy Access Menu: *Human Resources→ Personnel Management → Administration → HR Master Data → Maintain.*
   c) In the *Personnel number* field, enter employee number 540991## (Winnie Chung), and in the *Infotype* field, enter your infotype number.
   d) Choose *Create*. If necessary, specify a subtype (of your choice).
   e) Your infotype should have your new header. Choose *Cancel* (you do not have to save the infotype).

Task 2:

Do the following task: **(optional)**

1. How would you hide a field of your choice in the screen area for all employees?

   Hint: For this, you must first determine the program (screen) and the screen number of your infotype.

   Then, you must make the changes in Customizing. Do not actually make these changes.

   a) In the *Personnel number* field, enter employee number 540991## (Winnie Chung), and in the *Infotype* field, enter your infotype number.
   b) Choose *Create*. If necessary, specify a subtype (of your choice).
   c) In the *System* menu, choose *Status*.
   d) Make a note of the entries you find in the *Program (Screen)* and *Screen number* fields.
   e) To hide/show fields, navigate to the following IMG activity:
   f) IMG: *Personnel Management → Personnel Administration → Customizing User Interfaces → Change Screen Modification*
   g) Choose *Position* and enter the values you noted earlier in the *Module pool* and *Standard screen* fields.
   h) When the value is found, choose *Details*.
   i) As a deviation from the SAP standard, you can select *Show/Hide*.
   j) Do not actually make these changes; exit the input screen without saving.

Lesson Summary

You should now be able to:

- Customize the user interface of the infotype under Screen Header
- Customize the user interface of the infotype under Screen Modification

Lesson: Infotype Menus

Lesson Overview

- Creating individual infotype menus with selected infotypes
- Including infotype menus in personnel master data maintenance

Lesson Objectives

After completing this lesson, you will be able to:

- Create new infotype menus and process existing infotype menus
- Provide infotype menus as a tab page in the personnel master data maintenance of selected users

Business Example

You should create a new infotype menu for your employee, in which infotypes that were specified beforehand are offered for maintenance.

Infotype Menus

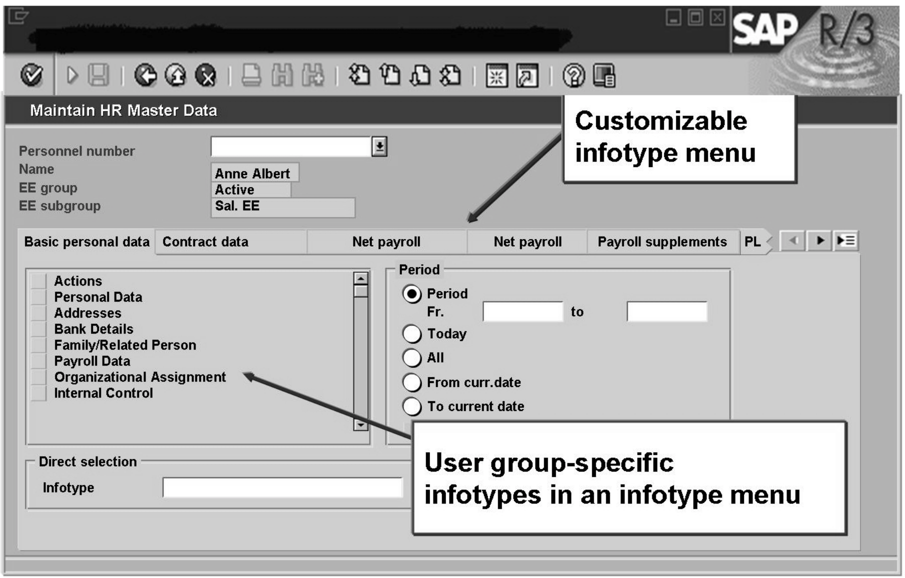


Figure 151: 3) Infotype Menus

Infotype Menus: You can select the required infotype for a certain personnel number from an infotype list and process it. You can change the menu sequence as follows:

- Defining user group-specific menus
- Changing the menu structure
- Inserting new menu options

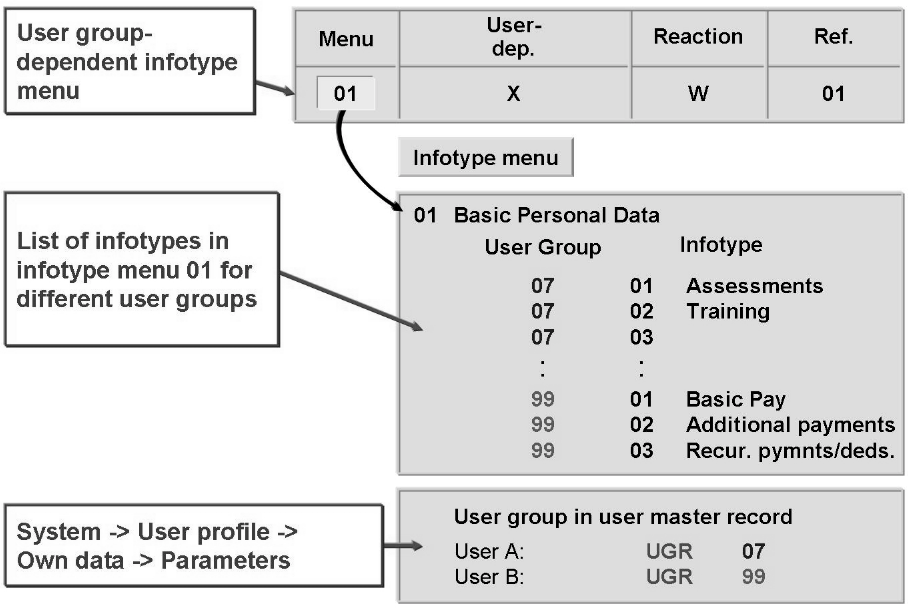


Figure 152: Changing Infotype Menus

The *Infotype Menu* customizing step guides you through the steps necessary to configure the information shown on each of the menu tabs.

The activities involved in configuring the choices on a menu tab include:

- Defining whether the menu is to be dependent on the user group
- If necessary, assigning the system response for the case where the user has not maintained the user group or where there are no entries in the menu
- Assigning a reference user group that can be used to set up the menu, if necessary

Infotypes in the Infotype Menu

- Select the menu category “I” and the infotype menu.
- Copy the infotypes into the menu for the user group.

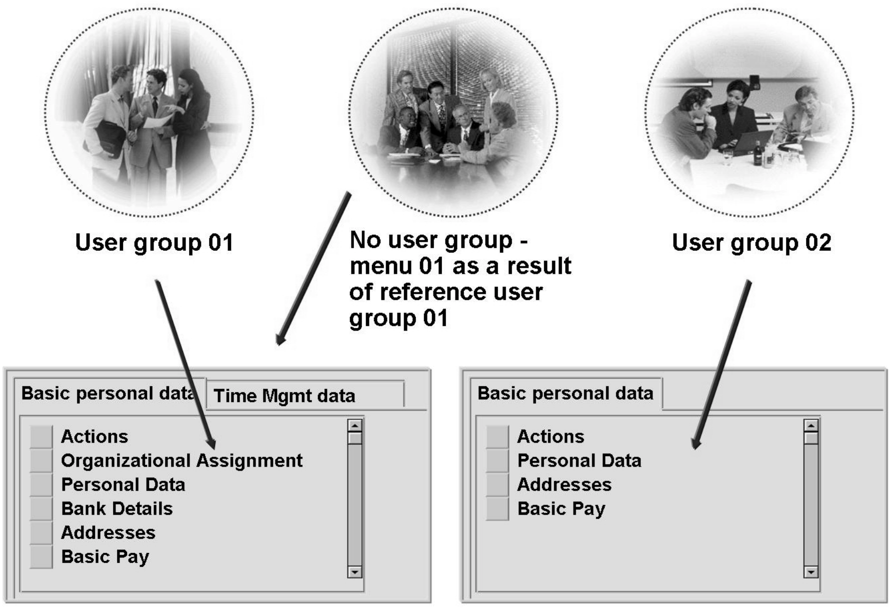


Figure 153: User Groups and Reference User Groups

You can use the menu control function to store different menus and personnel actions for different user groups (user parameter UGR). This means that you can adapt the system so that it meets the requirements of the individual users.

If your menu is distinguished as user group dependent, enter a reference user group as well, with which the menu is to be created if an administrator has not maintained the user group in his or her user master data. On this screen, you also specify the infotype sequence for the different user groups.

If you do not define your menu as user group dependent, you can only maintain the infotype sequence for the user group 00. This is valid for all users that select this menu.

Hierarchy When Building Infotype Menus

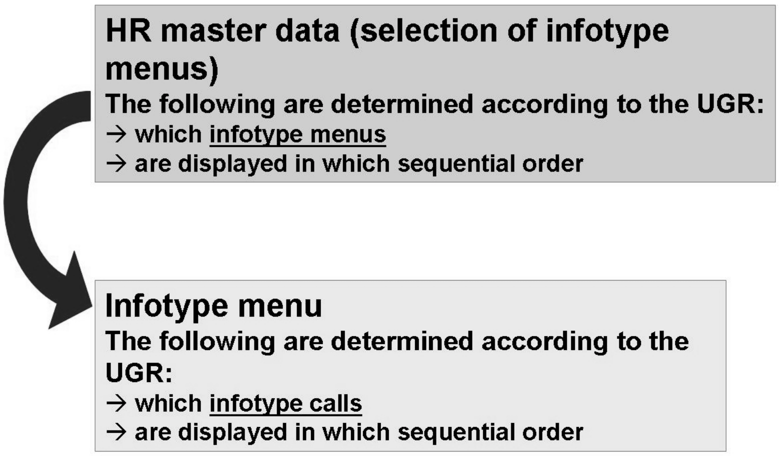


Figure 154: Hierarchy When Building Infotype Menus

- Up to this point, the infotype menu area has been described. In addition, you must also determine which infotype menus are displayed in the HR master data maintenance and display transaction.
- HR master data is processed in this step. You can determine - according to the various user groups - which infotype menus are displayed and the sequential order in which they are displayed. The relevant IMG activity is "Determine choice of infotype menus".

HR Master Data

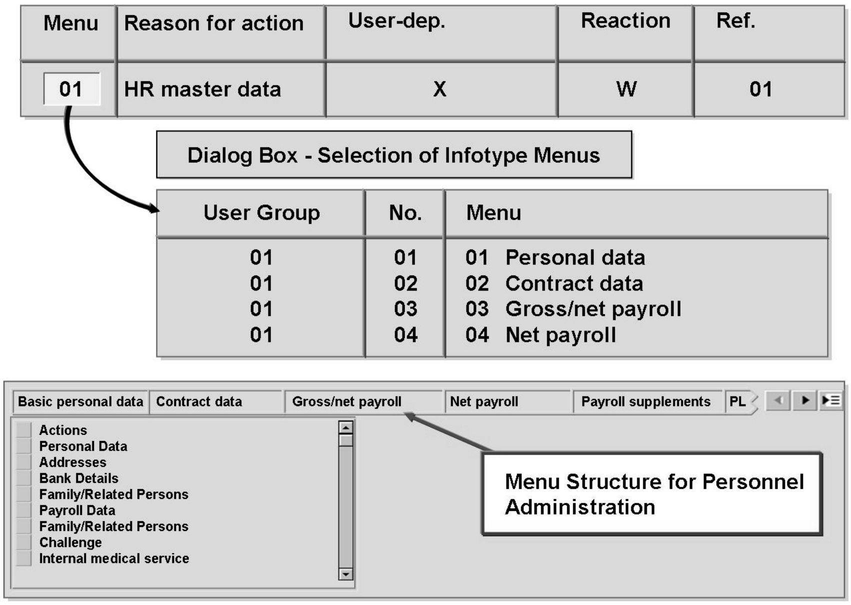


Figure 155: Defining the Selection of Infotype Menus

Here you define the structure of the menu that appears when the HR master data is maintained and displayed. This selection can also be defined using the user groups (user parameter “UGR”).

If no entry exists in the table for the user's user group, or if the user has not maintained his or her user group, the menu structure is determined using the reference user group.

User group dependence for infotype menu selection:

1. Select the menu type “S” and “01 HR master data” menu for infotype menu selection.
2. Determine the user group dependence and the system response if the user has not maintained the user group or there are no entries in the menu.
3. Assign a reference user group with which the menu can be created.

Infotype menus for infotype menu selection:

1. Choose the menu type “S” and “01 HR master data” menu for infotype menu selection.
2. Extend the “01 HR master data” selection menu by accepting the newly created infotype menus for the respective user group.

Menus for Fast Entry

Figure 156: Menus for Fast Entry

For fast entry menus, you can assign an entry screen, a default value screen and a selection report to a fast entry menu option.

Prerequisites

- If you want to change the infotype text, select the “Infotypes” customizing step, then the “Further Infotype Texts” activity, and enter a screen type for each infotype. This text can be accessed in the infotype menus.
- Set up the infotype menus for fast entry in the “Infotype Menu” step. The following infotype menus are predefined as standard settings for fast entry:
  - 07 Master Data Fast Entry (Dependent on the user group)
  - 09 Time Data Fast Entry (Dependent on the user group)
- Enter the corresponding screen type for your infotype (screen control field), so that the corresponding text is used.

In the “Set Up Infotype Menu for Fast Data Entry” step, you find the following activities:

- Activities - Selection reports for fast entry. If you use your own reports for personnel number selection in fast entry, you must ensure that these reports are allowed for all infotypes.
- Screen types for fast entry: For each infotype and screen type (screen control) you must define the screen number for creating records with default values, the screen number for fast entry of several personnel numbers, and the reports for personnel number selection.

Exercise 20: Infotype Menus

Exercise Objectives

After completing this exercise, you will be able to:

- Create customer-specific infotype menus that are dependent on user groups.
- Include your own infotype menu in the menu selection.

Business Example

The personnel administrators need their own infotype menu for the following infotypes that are not included in the standard menu:

- 0028 Internal Medical Service
- 0057 Membership Fees
- 0082 Additional Absence Data

This infotype menu should be available ONLY to users in your user group ##+50 in addition to several infotype menus that have already been set up.

Task 1:

Do the following exercises:

1. Create a new menu with the number ##+50 (## = group number) and the name *My Menu Gr.##*.
2. The menu should be dependent on the user group. The reference user group should be 01.
3. Include the infotypes listed above in the required sequence in your menu for the user group ##+50 (## = group number). Only infotype 0028 should be displayed for reference user group 01.

Task 2:

Do the following exercises:

1. Modify the HR master data. User group 50 + ## should be able to see all infotype menus that are displayed in user group 01. User group 50 + ## should also contain infotype menu 50 + ##.

Continued on next page

Task 3:

Do the following exercises:

1. To ensure that your newly set up infotype menu appears only for users in your user group, check that the UGR user parameter is set to ##+50 in your user profile.

Task 4:

Do the following exercises:

1. Go to Personnel Administration and check to see whether your infotype menu appears in the Other Menu selection.

Solution 20: Infotype Menus

Task 1:

Do the following exercises:

1. Create a new menu with the number ##+50 (## = group number) and the name *My Menu Gr.##*.
   a) *IMG: Personnel Management → Personnel Administration → Customizing Procedures → Infotype Menus → Infotype Menu*
2. The menu should be dependent on the user group. The reference user group should be 01.
   a) In the *Choose Activity* dialog box, select the *User group dependency on infotype menus* option.
   b) Choose *New entries* and enter the following information in the table:

Menu	**Field Text**	**User Group Dep.**	**Reaction**	**Ref**
##+50	My Menu Group ##	✓		01

   c) Choose *Save* and go back to the *Choose Activity* dialog box.

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3. Include the infotypes listed above in the required sequence in your menu for the user group ##+50 (## = group number). Only infotype 0028 should be displayed for reference user group 01.

   a) In the *Choose Activity* dialog box, select the *Infotype menu* option and then select *Choose*.

   b) In the *Determine Work Area: Entry* dialog box, enter your menu number (##+50) and choose *Continue*.

   c) Choose *New entries* and enter the following information in the table:

User Group	No.	Infotype	Screen Control	Infotype Text
##+50	*01*	*0028*		
##+50	*02*	*0057*		
##+50	*03*	*0082*		
01	*01*	*0028*		

   d) Save (confirm the information message with Enter) and return to the IMG.

Continued on next page

Task 2:

Do the following exercises:

1. Modify the HR master data. User group 50 + ## should be able to see all infotype menus that are displayed in user group 01. User group 50 + ## should also contain infotype menu 50 + ##.

   a) *IMG: Personnel Management → Personnel Administration → Customizing Procedures → Infotype Menus → Determine choice of infotype menus → Infotype menus*

   b) In the dialog box, enter “01” as the menu (for HR master data), since the menu should be available in master data, and choose *Continue*.

   c) Select the entries for user group *01* and choose *Copy as....*

   d) Change the user group for the copied rows of data from *01* to *## +50* and then choose *Enter*. A table should appear that is similar to the table shown below:

User Group	No.	Menu	Field Text
## + 50	01	01	Basic personal data
## + 50	02	02	Contractdata
## + 50	03	03	Gross/Net payroll
## + 50	04	04	Net payroll
## + 50	05	05	Payroll supplements
## + 50	06	06	Planning data
## + 50	07	ZZ	Time Mgmt. trans. data

   e) Choose *New entries* and enter the following information in the table:

User Group	No.	Menu	Field Text
## + 50	10	## + 50	My Menu Group ##

   f) Save and return to *Structure Display* in the IMG.

Continued on next page

Task 3:

Do the following exercises:

1. To ensure that your newly set up infotype menu appears only for users in your user group, check that the UGR user parameter is set to ##+50 in your user profile.

   a) *Easy Access Menu: System →User Profile → Own Data.*

   b) Select the *Parameters* tab page.

      Set the UGR user parameter to ##+50:

Parame- ters	Value	Field Text
UGR	##+50	User Group (HR Master Data)

   c) Save your entries.

Task 4:

Do the following exercises:

1. Go to Personnel Administration and check to see whether your infotype menu appears in the Other Menu selection.

   a) To check your changes, choose the following path in the SAP Easy Access menu:

   b) *Human Resources→ Personnel Management → Administration → HR Master Data → Maintain.*

   c) Use the scrollbar to locate your new menu (## +50).

      Hint: Your new menu should contain the following infotypes:

      0028 Internal Medical Service

      0057 Membership Fees

      0082 Additional Absence Data

Lesson Summary

You should now be able to:

- Create new infotype menus and process existing infotype menus
- Provide infotype menus as a tab page in the personnel master data maintenance of selected users

Unit Summary

You should now be able to:

- Describe what controls are available through infotype configuration
- Define fields relevant for retroactive accounting
- Explain what controls are available for the country infotype views
- Customize the user interface of the infotype under Screen Header
- Customize the user interface of the infotype under Screen Modification
- Create new infotype menus and process existing infotype menus
- Provide infotype menus as a tab page in the personnel master data maintenance of selected users

Unit 14

Personnel Actions

Unit Overview

The participant learns how a personnel action is created with the help of an example in this section. The meaning of the Additional Actions infotype is also discussed and some actions are carried out as examples.

Unit Objectives

After completing this unit, you will be able to:

- Configure personnel actions
- Give examples of personnel actions

Unit Contents

Lesson: Personnel Actions

Lesson Overview

- Configuration of actions
- Examples of personnel actions

Lesson Objectives

After completing this lesson, you will be able to:

- Configure personnel actions
- Give examples of personnel actions

Business Example

In your company, your employees receive a payment of EUR 200 when they have a child. You want to set up a personnel action containing the relevant infotypes for this.

General Information about Personnel Actions

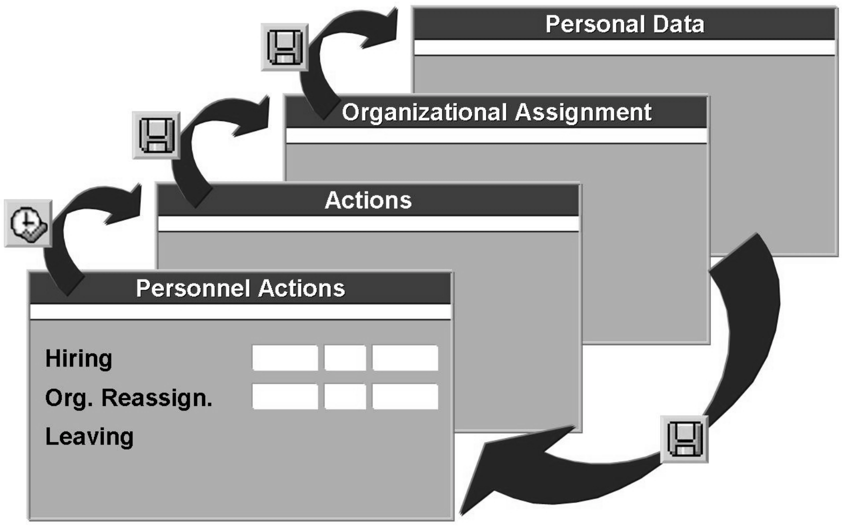


Figure 157: Overview: Personnel Actions

Actions facilitate the processing of complex personnel processes. The system displays all relevant infotypes in a sequence that has already been defined, so that you can maintain the necessary data.

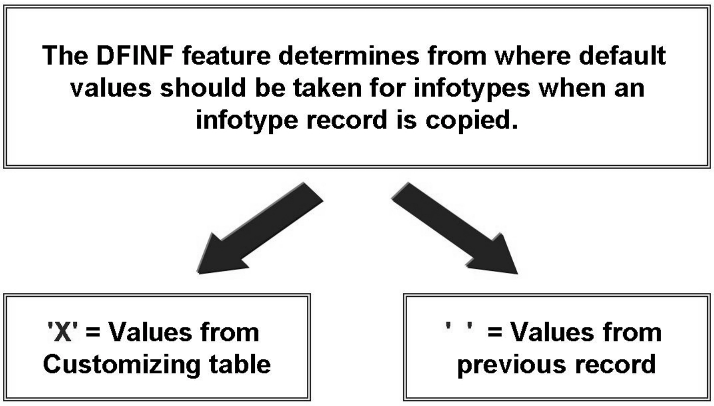


Figure 158: Default Values for Infotypes (DFINF)

This feature controls the determination of field values when you copy a record. Default values are usually copied from the previous record. However, in some cases, values should be redetermined using the Customizing settings. For example, this is possible for the following infotypes:

- Organizational Assignment (0001) - Default value for payroll area
- Planned Working Time (0007) - Default value for work schedule rule (SCHKZ)
- Basic Pay (0008) - Default values for pay scale type and area; also default values for capacity utilization level and working hours per period from infotype 0007

Setting up a New Personnel Action

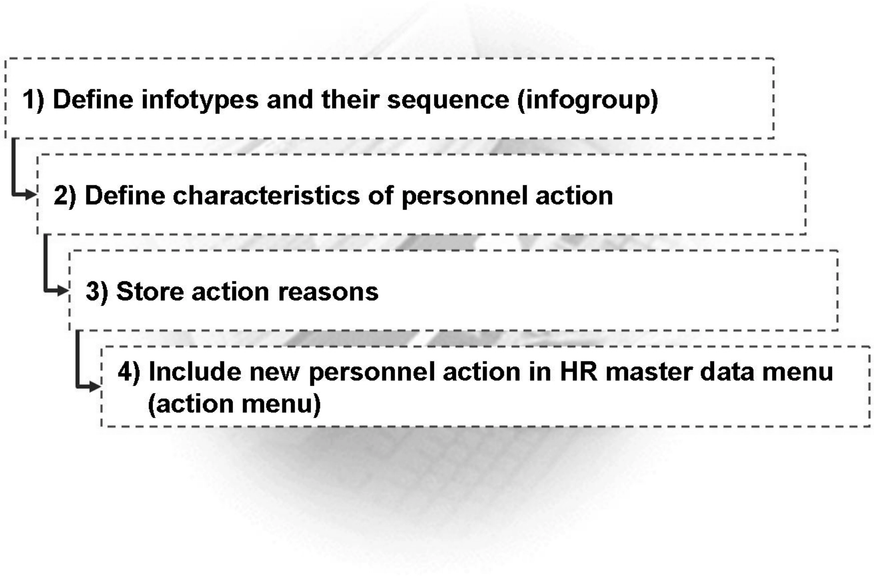


Figure 159: Setting up a New Personnel Action

Through configuration, you can:

- Change the sequence of the infotypes in existing actions
- Create new actions

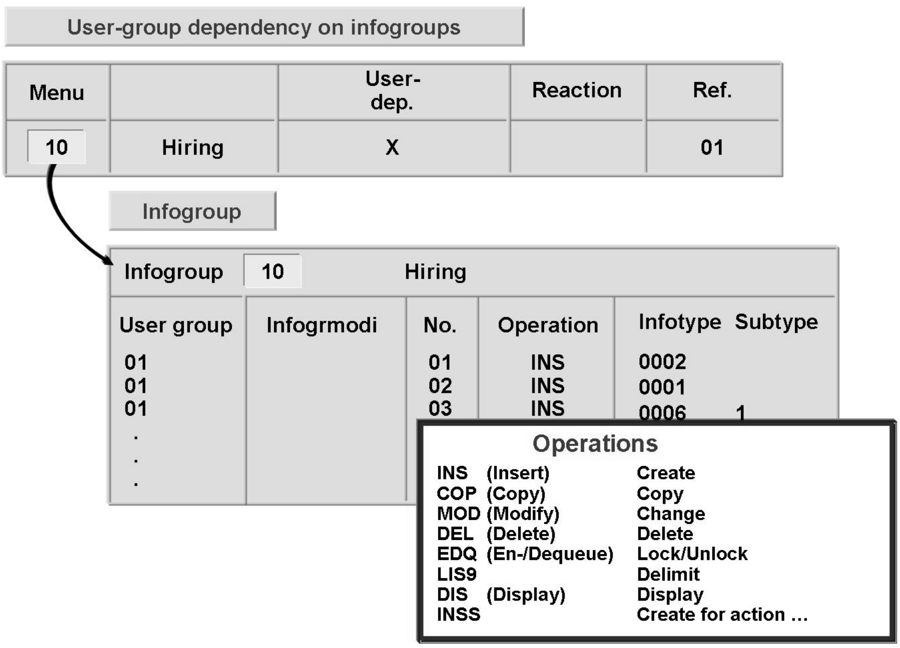


Figure 160: 1) Determining Infogroups

User-group dependency on infogroups: In this step, you define the infogroups processed when actions are executed. This is preparation for the next activity. You must determine the worklist for each personnel action that is to be completed, namely the **infogroup**. The infogroups can be defined depending on the user group (user parameter “ UGR”).

You can also specify that the infogroup is dependent on an employee's organizational data, for example, *the company code, personnel area, personnel subarea, employee group*, and *employee subgroup*, by maintaining the **IGMOD** feature (*Infogroup modifier activity*).

In the *Operation field*, you can specify which operation is executed with the infotype. When you perform an action and create infotype records, the system checks to see whether an infotype record already exists. In this case, the system switches from *Create* to *Change*. Therefore, it generally only makes sense to use the operation *Create* (INS) for a hiring action. For all other actions, you should use the *Copy* (COP) function code. When you copy infotype records, the system suggests the start date of the action for the existing records. If no records exist for the infotype, the system switches to *Create*.

If a new record is to be created independently of existing records, choose the operation *Create for Actions* (INSS). In this case, the system will not switch to the *Change* operation (MOD).

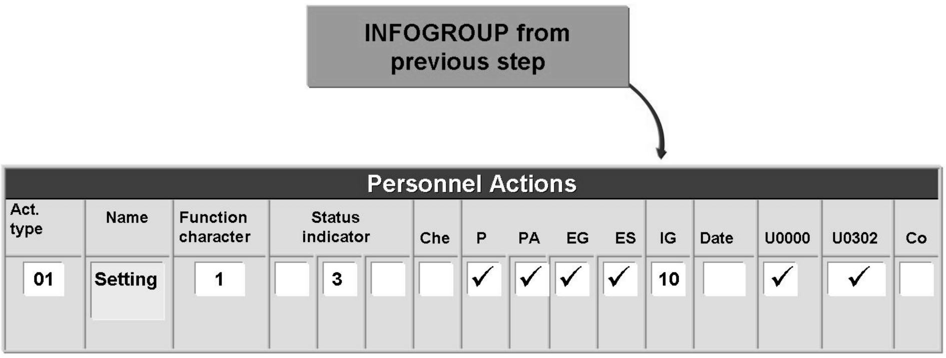


Figure 161: 2) Determining Personnel Action Types

To create an action:

- Assign a unique number and define a name for your personnel action.
- Use a **function character** to distinguish hiring actions from all other actions. Choose the function character 1 for an initial hiring, 7 for an initial hiring with data transfer from Recruitment and 0 for all other actions.
- You can maintain the customer-specific, employment, and special payment statuses using the *status indicator*.
- You can only use certain actions to change the *organizational assignment* of an employee. In this case, you can set the indicators for the *position, personnel area, employee group*, and *employee subgroup* to represent these as ready for input in the Personnel Actions initial screen.
- You can use the *Date* field to define whether the date entered on the initial screen of the personnel action should be the start date of new records or the end date of old records – this is particularly useful for leaving actions.
- Specify whether your new action should create a new *Actions* infotype record (0000).
- Use the indicator U0302 to determine whether the personnel actions are stored in the *Additional Actions* **(0302)** infotype.

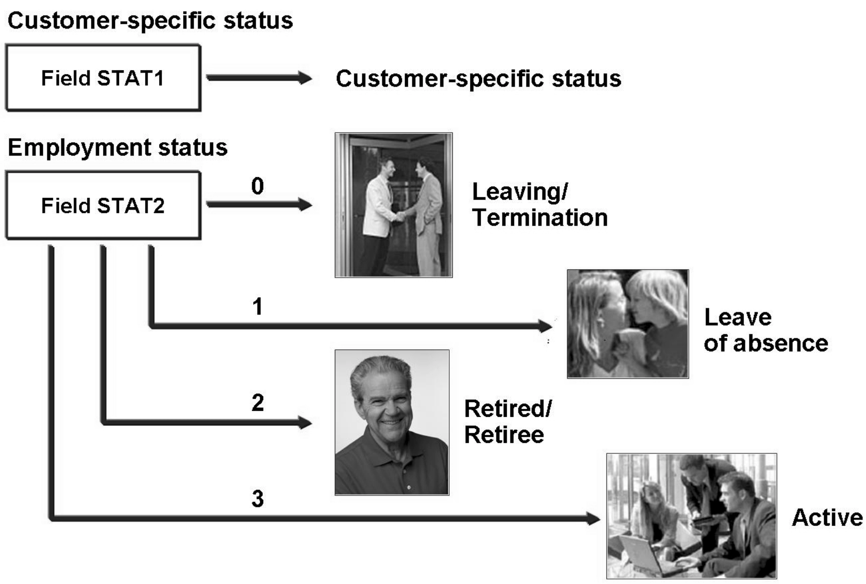


Figure 162: Change Personnel Actions Status Indicator

The status indicators in the *Actions* infotype are automatically maintained by the system if you execute an action. The status indicators have the following meaning:

- **Customer-specific status** - you can determine your own specific employee status with this indicator
- **Employment status**
  - Value 0 - The employee has left the company and should no longer be included in the payroll run. An individual retroactive run is permitted for him or her in the system.
  - Value 1 - The employee belongs to the company, but is granted leave for military service, maternity leave, or other absence reasons. In reality, most inactive contracts are not entered in the system as status changes but as absences. Payroll is run for inactive employees, but their pay can be reduced according to special factoring rules.
  - Value 2 - The employee is retired. If this person is entitled to a company pension, the system still includes this employee in the payroll run. If not, the system assigns specification 0 to this employee.
  - Value 3 - The employee belongs to the company and is active.
- **Special payment status** - for wage type decisions

Example: You want to run the Early Retirement / Retirement personnel action

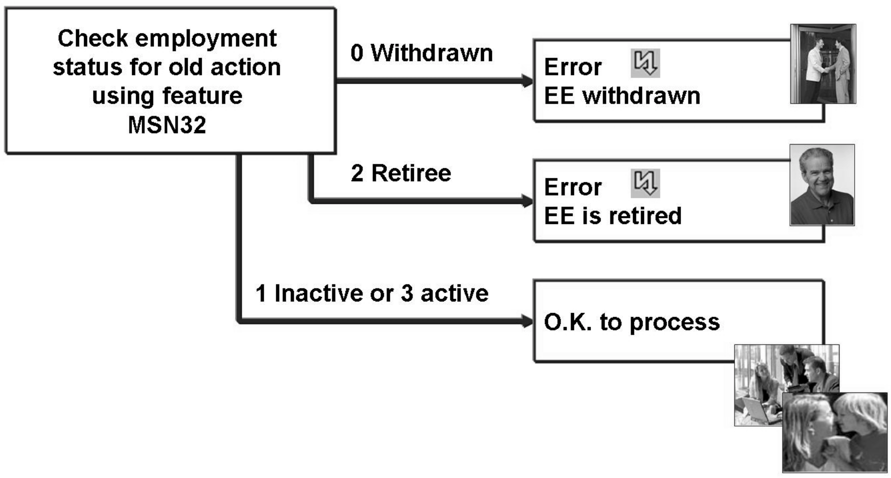


Figure 163: Checking Status Indicators When Executing Actions

When you execute a new action, the system checks whether the attributes of the new action match those of the previous action.

This check is controlled by the following features

- MSN20 for leaving
- MSN21 for hiring
- MSN32 for early retirement/retirement

These features check the old actions against the new, proposed action. This takes place, for example, if you want to execute an action to retire an employee. The action checks feature MSN32.

If the old action has:

- STAT2=0 → There is an error because the employee has already left the company
- STAT2=2 → There is an error because the employee has already retired
- STAT2=3 → The processing continues because the employee is active

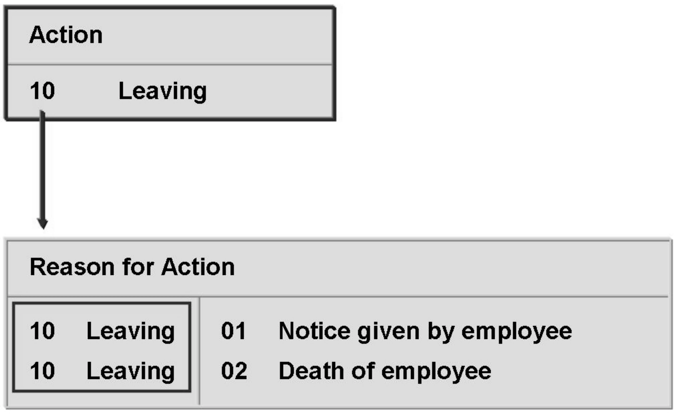


Figure 164: 3) Defining Reasons for Personnel Action Types

The action reason indicates why the action was triggered.

You can use this information to evaluate why employees leave or why they are transferred.

You must always enter at least one reason for each action, even if the entry is just a blank space.

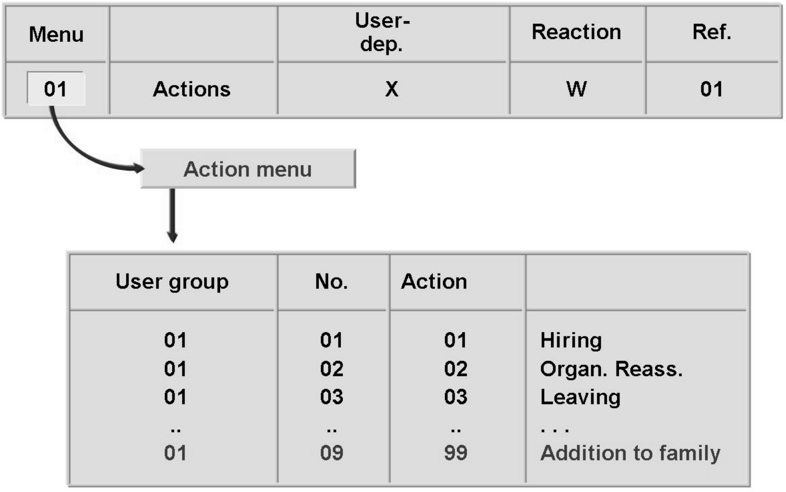


Figure 165: 4) Changing The Actions Menu

You need to include the personnel action that you have just defined in the Personnel Actions menu. You can also define this menu so that it is dependent on a user group (user parameter *UGR*).

If there is no entry in the table for your user's user group or if you have not maintained your user group, the system displays the menu for the reference user group.

User-group dependency of actions menu: Specify whether menu "**01**" for the personnel actions should be dependent on the user group. Specify how the system responds if the user has not maintained the user group, and a reference user group so that the menu can be created.

Actions in the Actions menu: Enter the new action for the user group and define where the action will appear in the menu (field *no.*).

Additional Actions Infotype

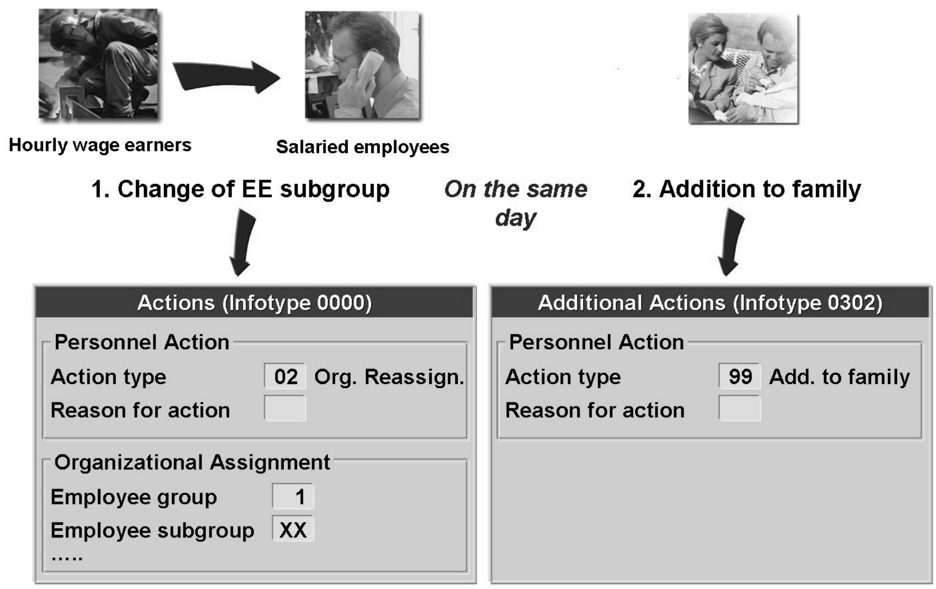


Figure 166: Additional Actions

The *Additional Actions (0302)* infotype allows you to log all personnel actions that you execute for an employee on the same day. The log records all the action types and the corresponding action reasons run for the employee according to a key date.

All programs that interpret an employee's status, evaluate the *Actions* infotype (0000) exclusively. This has the time constraint 1, which means that only one valid *Actions* infotype record can exist in the system at any one time for the employee's activity in the company.

Displaying Additional Actions in Actions Infotype

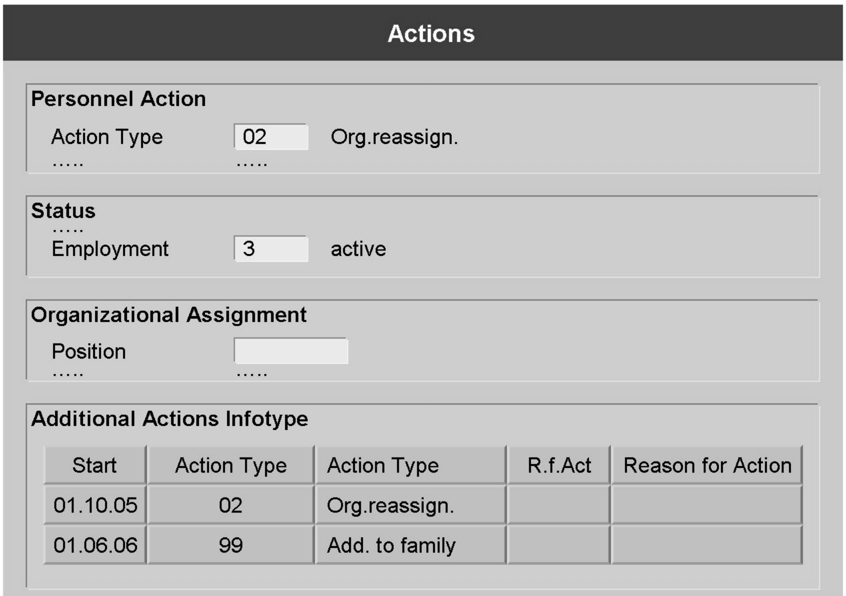


Figure 167: Displaying Additional Actions in Actions Infotype

Ensure that only one personnel action is saved in the *Actions* infotype (0000) per day. In Customizing, you can specify which action type should be stored, that is, which should be kept, for an employee per day if more than one personnel action was run for the employee on the same day. Usually, you should choose personnel actions whose status is changing, such as the *Leaving* personnel action, which causes a status change from *active* to *left*. The other action(s) are stored in IT0302.

Only action types and action reasons are saved in the *Additional Actions* infotype (0302).

Hint: You can not execute two different status-changing personnel actions for one employee on the same day. For example, you cannot run a leaving action and an early retirement/retirement action on the same day. In this case, one action would overwrite the other.

If you want to use the *Additional Actions* infotype (0302), use report RPUEVSUP to make the necessary entries:

Examples of Personnel Actions

- ***Leaving*** **personnel action**
  - **Status change in *Actions* infotype, employment status set to *withdrawn***
  - **Personnel number is not deleted**
  - **Certain infotypes are delimited**
  - **Other infotypes cannot be delimited**

Figure 168: Employee Leaves the Company

When an employee leaves the company, you cannot change certain infotypes because the system needs them to create a history. However, you must delimit some infotype records when an employee leaves the company.

When an employee leaves the company, his or her personnel number **cannot be deleted**.

When an employee leaves the company, a new Actions infotype record (0000) is created for the leaving action. This infotype record stores the leaving date and the reason for leaving. You must enter the reason for leaving for statistics and reporting purposes. When an employee leaves the company, the system automatically changes the employment status accordingly. Upon leaving the company, the employee has employment status 0. Payroll recognizes this status, and does not select this employee for inclusion in the subsequent payroll period. The system also does not select employees with status 0 for several other evaluations. You must leave organizational data, personal data, addresses, and basic payroll data in the system. You cannot delimit the data records, as the employee may still receive payments (for overtime or leave compensation, for example), or may still have to be contacted after the last payroll has been run. In addition to this, this data is also used for reporting purposes.

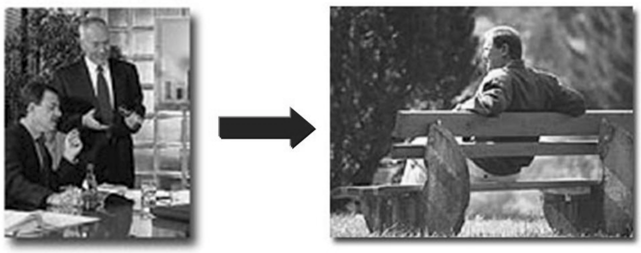
You cannot delimit the Basic Pay infotype (0008). If you delimit this infotype, the system cannot perform retroactive accounting correctly. If you do want to compensate an employee once he or she has left, then you can use either of the following infotypes: Recurring Payments/Deductions (0014) or Additional Payments (0015).

Reentry personnel action

- Existing personnel number is used again
- Status change in _Actions_ infotype, employment status set to _active_
- Start date entered into delimited infotypes

Figure 169: Employee Reenters the Company

The SAP system uses the term Reentry to mean an employee who has left the company and then re-enters the same company. The system uses the previous personnel number for such a personnel action. The system sets the employment status to 3 (for active) in the Actions infotype (0000) when you run the personnel reentry action. The system creates new infotype records for all infotypes delimited when the employee originally left the company. In the new records, the system uses the re-entry date as the start date.



Early Retirement/Retirement personnel action

- Status change in _Actions_ infotype, employment status set to _Retiree_
- Employee group _Retiree_ and employee subgroup _Retiree_
- Company pension entered into the _Basic Pay_ infotype

Figure 170: Retiree with Company Pension

If one of your active employees retires or goes into early retirement, you need to run the relevant personnel action. The system automatically sets the status field in the Actions infotype to 2 for retiree. You must assign the employees to employee group Retiree, and to employee subgroup Retiree. To pay the pension, simply enter the corresponding wage type in the Basic Pay infotype.

If an employee who left the company years ago is now entitled to a company pension, you must first run a reentry action, followed by the retirement action.

Figure 171: Retiree Working as a Night Shift Security Guard

If an employee entitled to a company pension works as a night shift security guard in your company, for example, you must hire him or her with a new personnel number. This ensures the employee receives employment status 3 (active) with the second personnel number, and that the system assigns the employee to the employee group 'Active' and the employee subgroup 'Night shift security guard'.

To refer to the previous personnel number, use the *Reference personnel number* field in the *Organizational Assignment* infotype. This field is available when you perform a hiring action.

You need to create a second personnel number because the money earned as a night shift security guard is taxed according to different tax guidelines.

Exercise 21: Personnel Actions

Exercise Objectives

After completing this exercise, you will be able to:

- Set up personnel actions and define them for different user groups

Business Example

The personnel administrators need a personnel action that groups together all the necessary infotypes that need to be maintained when an employee has a child. Since your company gives employees a one-off payment of EUR 200 for the birth of a child, you should also incorporate this in the personnel action.

In addition, this personnel action should appear for users in the ##+50 user group only.

Task 1:

For the following exercise, use this overview to find out the relevant infogroup and action type for you.

Group Course Partici-pants	Info-group	Action type	Group Course Partici-pants	Info-group	Action type
00	M0	A0	16	N6	B6
01	M1	A1	17	N7	B7
02	M2	A2	18	N8	B8
03	M3	A3	19	N9	B9
04	M4	A4	20	P0	C0
05	M5	A5	21	P1	C1
06	M6	A6	22	P2	C2
07	M7	A7	23	P3	C3
08	M8	A8	24	P4	C4
09	M9	A9	25	P5	C5
10	N0	B0	26	P6	C6
11	N1	B1	27	P7	C7
12	N2	B2	28	P8	C8
13	N3	B3	29	P9	C9
14	N4	B4	30	Q0	D0
15	N5	B5			

Create a new Addition to Family Gr.## action to include the following infotypes:

• *Personal Data (0002)*: Copy

• *Family/Related Person (0021), subtype Child:* Call using dynamic action

• *Additional Payments (0015), subtype M610:* Create new record. If a record of this infotype already exists, use this as a template.

1. Create a user group dependent infogroup (see table for namespace) in which the *Personal Data (0002)* and *Additional Payments* (0015) infotypes are copied or created for user group 50 + ##. If a user has reference user group 01, only copy infotype 0002.

Continued on next page

2. Create a new personnel action (see table for namespace of action type) in which users can access the infogroup just created. This personnel action should have the following characteristics:

   Since the data on organizational assignment should not change, these fields are not ready for input in the initial screen of the personnel action.

   Store in *Additional Actions (0302)* infotype only (not in the *Actions (0000)* infotype).

3. Enter at least two reasons for your new action (of your choice, for example, *Birth of a child* or *Adoption of a Child*).

4. Include the personnel actions *Early retirement/Retirement, Leaving, Reentry into Company, Hiring HR305*, and the personnel action you have just created, *Addition to Family GR.##*, in your user group ##+50.

Task 2:

Do the following exercises:

1. On the first day of this month, your employee Winnie Chung (540991##) had a baby. Perform your newly created *Addition to Family GR.##* personnel action for Winnie and also assign her the bonus payment of EUR 200.

Task 3:

Do the following tasks: **(optional)**

You want to execute different additional personnel actions for the sales executive you hired on the first day of the course (pers. no. 305991##):

1. *Employee 305991##* is laid off on the first day of this week. Use the personnel action *Leaving* to execute this action.

2. Re-hire employee *305991##* as of tomorrow. Use the *Reentry into company* personnel action to execute this action.

3. Your employee *305991##* will retire next Monday. Use the *Early retirement* personnel action to process this employee's retirement.

Solution 21: Personnel Actions

Task 1:

For the following exercise, use this overview to find out the relevant infogroup and action type for you.

Group Course Partici-pants	Info-group	Action type	Group Course Partici-pants	Info-group	Action type
00	M0	A0	16	N6	B6
01	M1	A1	17	N7	B7
02	M2	A2	18	N8	B8
03	M3	A3	19	N9	B9
04	M4	A4	20	P0	C0
05	M5	A5	21	P1	C1
06	M6	A6	22	P2	C2
07	M7	A7	23	P3	C3
08	M8	A8	24	P4	C4
09	M9	A9	25	P5	C5
10	N0	B0	26	P6	C6
11	N1	B1	27	P7	C7
12	N2	B2	28	P8	C8
13	N3	B3	29	P9	C9
14	N4	B4	30	Q0	D0
15	N5	B5			

Create a new Addition to Family Gr.## action to include the following infotypes:

• *Personal Data (0002)*: Copy

• *Family/Related Person (0021), subtype Child:* Call using dynamic action

Continued on next page

• *Additional Payments (0015), subtype M610:* Create new record. If a record of this infotype already exists, use this as a template.

1. Create a user group dependent infogroup (see table for namespace) in which the *Personal Data (0002)* and *Additional Payments* (0015) infotypes are copied or created for user group 50 + ##. If a user has reference user group 01, only copy infotype 0002.

   a) IMG: *Personnel Management → Personnel Administration → Customizing Procedures → Actions → Define infogroups*

   b) Choose *User Group Dependency from menus* and *infogroups*in the *Choose Activity* dialog box.

   c) Choose New Entries, and then enter the following information in the table:

Menu	Field Text	User grp. dep.	Reaction	Ref.
See infogroup assignment in the table	*Infogroup ## Addition to Family*	✓		*01*

   d) Choose Save and return to the *Choose Activity* dialog box. Select the *Infogroups* action.

   e) In the *Determine Work Area: Entry* dialog box, enter your infogroup and choose *Continue*.

   f) Choose *New entries*

   g) Make the following entries in the table:

User Group	Info-grp. modif.	No.	Opera-tion	Infotype	SC	Info-type text	Sub-type
## + 50		*01*	*COP*	*0002*			
## + 50		*02*	*INS*	*0015*			*M610*
01		*01*	*COP*	*0002*			

   h) Save your entries and ignore the warning message stating that no entries exist for your reference user group.

   i) Return to the IMG.

Continued on next page

2. Create a new personnel action (see table for namespace of action type) in which users can access the infogroup just created. This personnel action should have the following characteristics:

   Since the data on organizational assignment should not change, these fields are not ready for input in the initial screen of the personnel action.

   Store in *Additional Actions (0302)* infotype only (not in the *Actions (0000)* infotype).

   a) To create the action, choose the following IMG menu path:

   b) IMG: *Personnel Management → Personnel Administration → Customizing Procedures → Actions → Set up personnel action types*

   c) In the *Choose Activity* dialog box, select *Personnel Action types*.

   d) Choose *New entries* and enter the following information in the table:

Action Type	Name of Action Type	FC	Status			P	P	P	E	E	Info Group	D	U000	U0302	C
Your action type acc. to table	Addition to Family Gr ##	0					☐	☐	☐	☐	Your info group acc. to table		☐	☑	☐

Figure 172: Data Table:

   e) Save and return to the main IMG.

3. Enter at least two reasons for your new action (of your choice, for example, *Birth of a child* or *Adoption of a Child*).

   a) IMG: *Personnel Management → Personnel Administration → Customizing Procedures → Actions → Create reasons for personnel actions*

   b) Create the following two new entries:

Action type	Name of Action Type	Action Reason	Name
Your action type	*Addition to Family Gr ##*	*01*	*Birth of child*
Your action type	*Addition to Family Gr ##*	*02*	*Adoption of a child*

   c) Choose *Enter*, save your entries, and return to the IMG.

Continued on next page

4. Include the personnel actions *Early retirement/Retirement, Leaving, Reentry into Company, Hiring HR305*, and the personnel action you have just created, *Addition to Family GR.##*, in your user group ##+50.

   a) *Personnel Management → Personnel Administration → Customizing Procedures → Actions → Change action menu*

   b) Choose *User Group Dependency from menus* and *infogroups*in the *Choose Activity* dialog box.

   c) Ensure that the *User group dependency* indicator for the actions menu *01* is set.

   d) Return to the *Choose Activity* dialog box.

   e) In the *Choose Activity* dialog box, select *Personnel Action menu*.

   f) In the dialog box, enter *01* in the Menu field and then choose *Continue*.

   g) You can copy existing entries of user group *00* to make data entry easier.

   h) To do so, select the actions used in the exercises for the *00* user group and choose *Copy as ...*

   i) Change the user group *00* to your user group (##+50).

   j) Choose *Enter* and *Save*. To create the new entry shown in the table below, choose *New Entries*:

User Group	No.	Action Type	Name of Action Type
##+50	*for example, 30*	*Your action type*	*Addition to Family Gr ##*

   k) Save your data and return to the IMG.

Continued on next page

Task 2:

Do the following exercises:

1. On the first day of this month, your employee Winnie Chung (540991##) had a baby. Perform your newly created *Addition to Family GR.##* personnel action for Winnie and also assign her the bonus payment of EUR 200.

   a) Easy Access Menu: *Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions.*

   b) In the *Personnel number* field, enter *540991##* and then in the *From* field, enter the first day of the month.

   c) Locate your new action (*Addition to Family GR. ##)*, select it, and then choose *Execute*.

   d) In the *Actions infotype (0000)*, enter one of the reasons you created in Customizing for the personnel action and choose *Save*.

   e) In the *No. child.* field of the *Personal Data infotype (0002)*, enter the value *1* and also maintain the *Family/Related Person infotype (0021)*, which is called using the dynamic action, with entries of your choice. Confirm any warning messages.

   f) If additional infotypes, such as Create Child Allowance, are called by the dynamic action, skip these by choosing *Cancel* until the *Additional Payments* infotype (0015) appears.

   g) Assign EUR 200 as the amount of the bonus payment. Finally, save this last infotype, *Additional Payments (0015)*, of the personnel action and return to the initial screen.

Continued on next page

Task 3:

Do the following tasks: **(optional)**

You want to execute different additional personnel actions for the sales executive you hired on the first day of the course (pers. no. 305991##):

1. *Employee 305991##* is laid off on the first day of this week. Use the personnel action *Leaving* to execute this action.
   a) *Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions.*
   b) Enter the personnel number *305991##.*
   c) Enter the first day of this week as the start date.
   d) Select the *Leaving* personnel action.
   e) Choose *Execute*, and process the individual infotypes:
   f) If the system prompts you to do so, create the vacancy for the default date.
   g) If the system prompts you to do so, select the personnel officer Mike Hire on the *Create Vacancy* screen and save the data.
   h) Return to the *Personnel Actions* screen.
2. Re-hire employee *305991##* as of tomorrow. Use the *Reentry into company* personnel action to execute this action.
   a) Enter tomorrow’s date as the start date.
   b) Select the action *Reentry into company*.
   c) Choose *Execute*, and process the individual infotypes:
   d) Select a position in the Caliber 'A' Bicycle Company using the *Structure search* function.
   e) Save your entries, and return to the *Personnel Actions* screen.
3. Your employee *305991##* will retire next Monday. Use the *Early retirement* personnel action to process this employee’s retirement.
   a) Enter the start date as Monday of next week.
   b) Select the *Early retirement* personnel action.
   c) Choose *Execute*, and process the individual infotypes:
   d) If the system prompts you to do so, create the vacancy for Monday of next week.
   e) Save your entries and return to the SAP Easy Access menu.

Lesson Summary

You should now be able to:

- Configure personnel actions
- Give examples of personnel actions

Unit Summary

You should now be able to:

- Configure personnel actions
- Give examples of personnel actions

Unit 15

Dynamic Actions

Unit Overview

In this section, it is demonstrated how the automatic calling of additional infotypes or the sending of a mail is triggered by a certain event.

Unit Objectives

After completing this unit, you will be able to:

- Initiate different actions using a dynamic action: – Maintaining an additional infotype record – Sending a mail

Unit Contents

Lesson: Dynamic Actions

Lesson Overview

Dynamic actions can trigger the following actions:

- Maintaining additional infotypes
- Sending a mail

Lesson Objectives

After completing this lesson, you will be able to:

- Initiate different actions using a dynamic action:
  – Maintaining an additional infotype record
  – Sending a mail

Business Example

Your HR department would like three automatic actions to occur in the system:

- When an employee's marital status changes from single to married, the "Family/Related Person" infotype should appear automatically.
- When an administrator's area of responsibility changes, he or she should be informed automatically by mySAP ERP 2004 office mail.
- The HR administrators would like to be reminded to ask an employee who has borrowed a laptop to return it one month before the employee should return it

General Functions

When certain events occur, dynamic actions trigger actions in the system, such as

1) Maintain another infotype record (I)
2) Send an e-mail through SAPOffice (M)

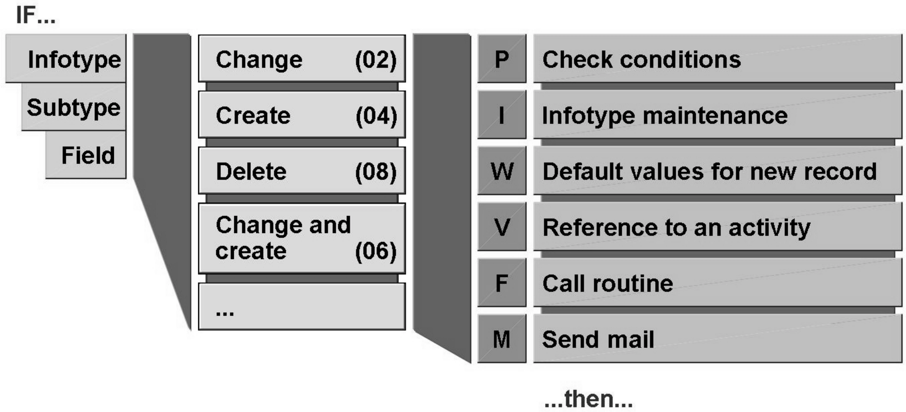


Figure 173: Dynamic Actions

So that a certain action can be executed by the system, you must determine when this is to be done and whether the action is initiated using *Change* (02), *Insert* (04), and/or *Delete* (08) of the infotype record. The system can also be set up so that it recognizes AND/OR situations. The values for *Change*, *Create*, or *Delete* can be added. The value of maintenance operation 06 thus means that an action is performed if the current record is changed or if it is expanded (02 change + 04 create).

In the function part (of the table), you can enter plausibility checks for actions, for example, old and new field values. Finally, you can formulate standard values for a record that has been added.

Hint: If you also use Recruitment, you must make sure that the system calls up the dynamic actions for the correct application. To ensure this, you must first ask for the transaction class:

- PSPAR-TCLAS="A" for Personnel Administration
- PSPAR-TCLAS="B" for Recruitment

Maintaining Additional Infotypes

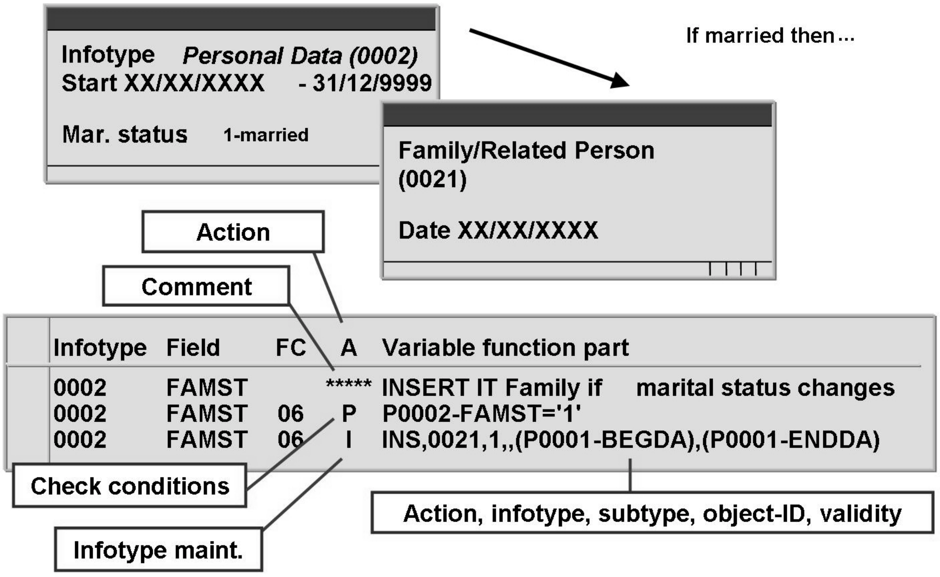


Figure 174: 1) Dynamic Actions - Maintaining Additional Infotypes

You can use dynamic actions to control that actions are called when maintaining an infotype record. This can be the maintenance of an additional infotype record, sending mail using SAPoffice or performing a routine.

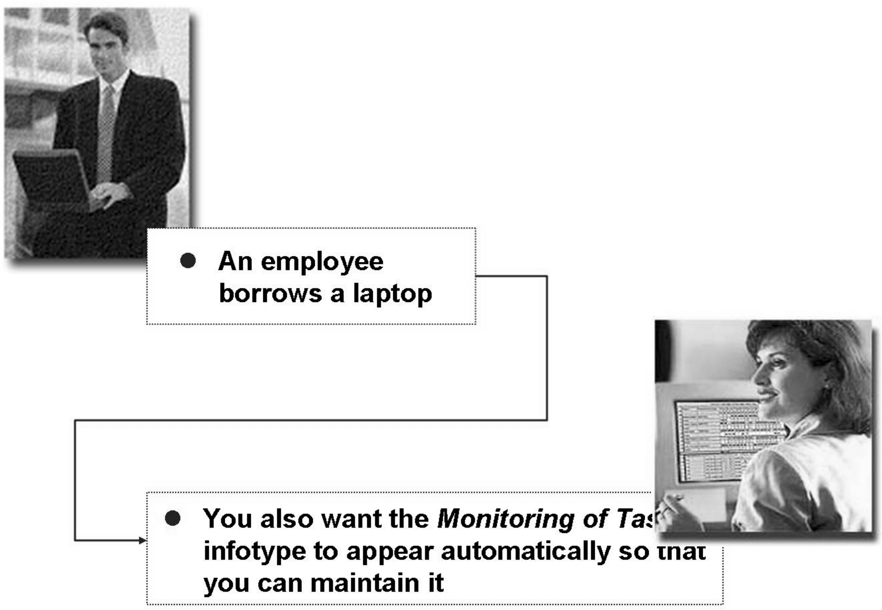


Figure 175: Example: Maintaining Additional Infotypes

Sending Mail

2) Dynamic Actions: Mail Connection for Infotype Changes

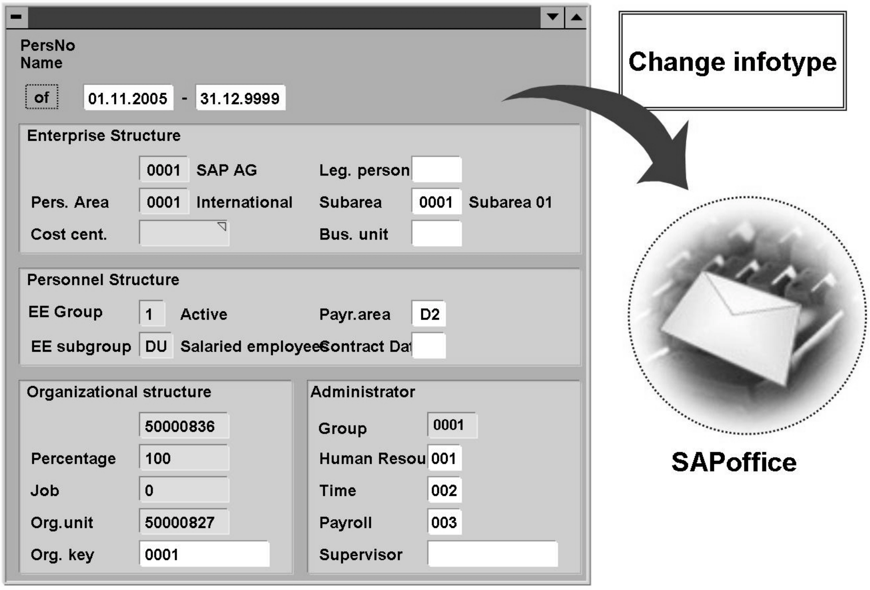
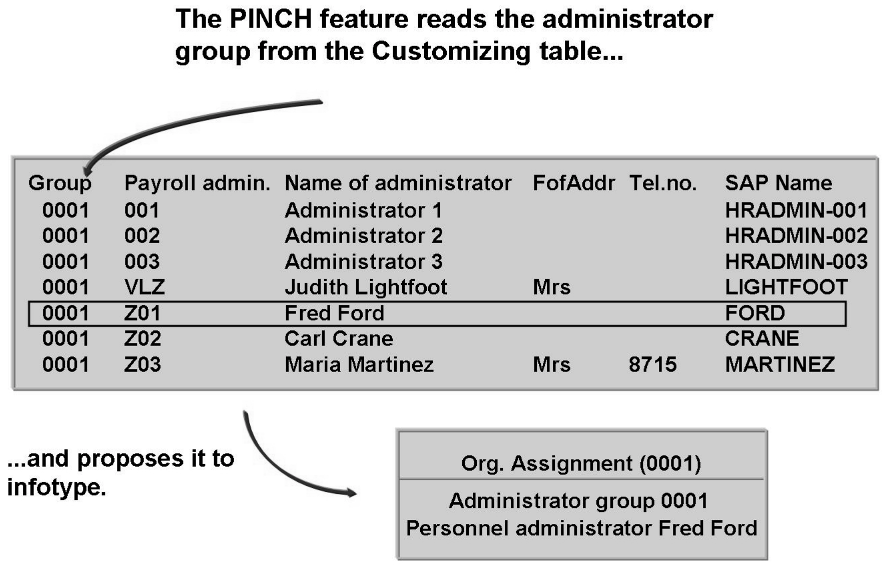


Figure 176: 2) Dynamic Actions – Mail Connection for Infotype Changes

When you have changed an infotype record, you can use the dynamic action mail function in SAPoffice to automatically inform others of this change.

Example:
You have changed an employee's *Organizational Assignment* infotype (0001). Certain system users, for example, the administrator or head of department, need to be informed of these changes.

Before you can use the dynamic action function, you must fulfill several preconditions. To begin with, you must enter in the *Organizational Assignment* infotype the name of the administrator who is responsible for maintaining the infotype records of this employee. You must also assign an SAP user name to this administrator. This user name is accessed by a feature and the user then automatically receives a mail informing him or her of the changes.



Group	Payroll admin.	Name of administrator	FofAddr	Tel.no.	SAP Name
0001	001	Administrator 1			HRADMIN-001
0001	002	Administrator 2			HRADMIN-002
0001	003	Administrator 3			HRADMIN-003
0001	VLZ	Judith Lightfoot	Mrs		LIGHTFOOT
0001	Z01	Fred Ford			FORD
0001	Z02	Carl Crane			CRANE
0001	Z03	Maria Martinez	Mrs	8715	MARTINEZ

Figure 177: Define Administrators and Administrator Groups

You have three different input options as the personnel administrator in the *Organizational Assignment* infotype:

- PersAdmin
- Time Evaluation
- Payroll

A link to these administrators can be created in the dynamic actions so that they automatically receive an email through SAPoffice if certain changes are made in the employee records of an administrator.

The standard mySAP ERP 2004 system has a dynamic action, whereby if an administrator changes in the IT0001 record of an employee, both the old and the new administrators are informed of this through SAPoffice mail.

Hint: This is not one of the workflow's functions, since no action must be executed. It solely notifies the administrator that a change has occured in an employee record.

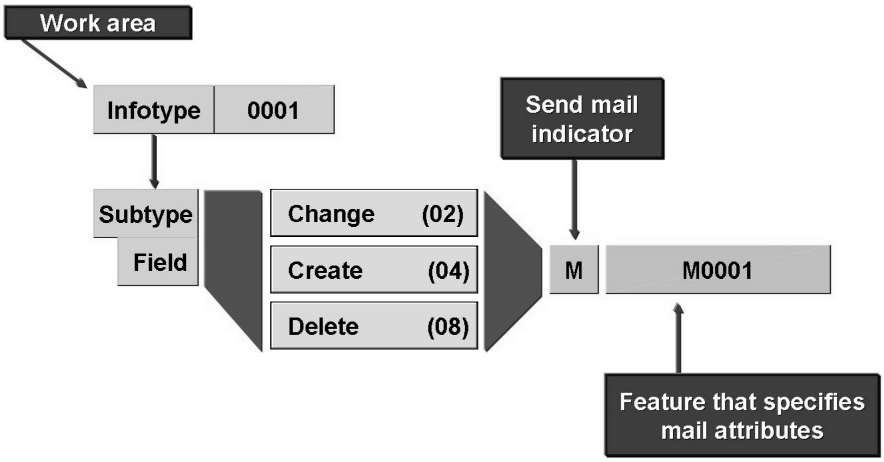


Figure 178: Define Conditions for Sending a Mail

When determining the conditions, including whether a message is triggered when processing an infotype record, you can specify for which processing type (*Insert*, *Change*, or *Delete*) or for which combinations of processing types a mail is sent.

The action "M" signals the system to *Send Mail* and establishes the link to the corresponding feature.

You must also define the feature (for example, M0001).

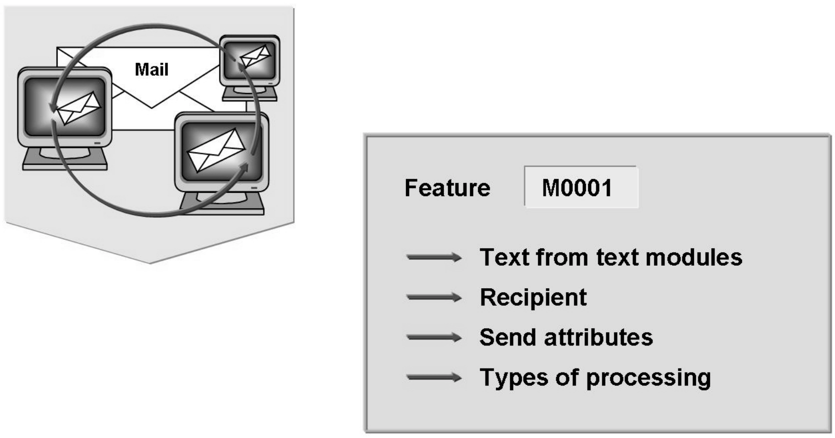


Figure 179: Define Mail Attributes

You can use the feature to control who receives the mail, the text to be used in the message and the types of processing that should be possible in the mail function. The feature can be used for all master data infotypes for employees (TCLAS=A) and applicants (TCLAS=B).

In the feature you define the standard text (=IDTXT). You can create and/or change this text in the next step.

The mail is sent to the administrator from the *Organizational Assignment* infotype record of an employee (RECV1 = Human Resources, RECV2 = Time Recording and RECV3 = Payroll). For applicants, a mail can only be sent to RECV1 (Personnel Officer).

By using additional parameters, you can also specify whether a mail should be moved to the outbox after it has been sent or if it should be sent to all persons on a particular distribution list.

You can define whether a certain processing type should trigger specific actions (transaction code, infotype, subtype, and so on).

For more information about the feature M0001, call feature maintenance M0001 and select *Display documentation*. Refer also to the general documentation on maintaining features.

You can copy feature M0001 and use it as M0008 for the *Basic Pay* infotype (0008), for example. Make sure that you adapt the decision tree for the feature accordingly.

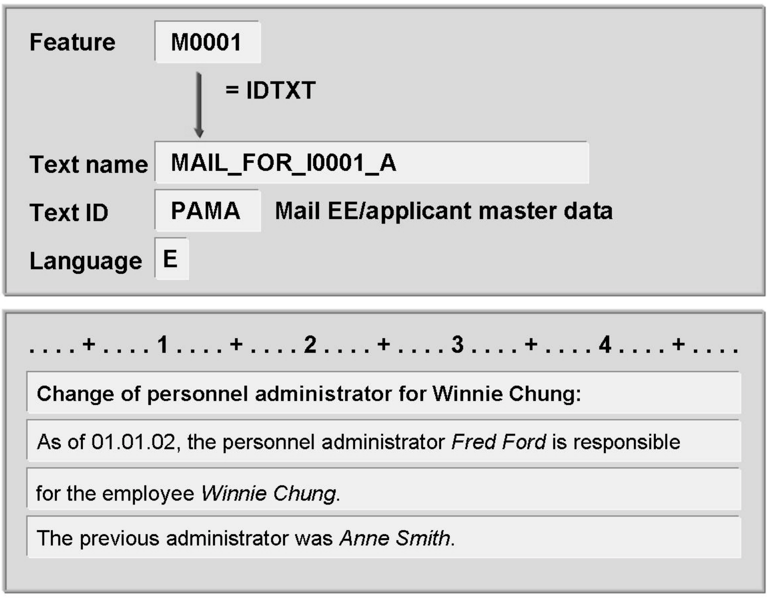


Figure 180: Create Standard Texts for Mail Connection

Two examples of text templates are delivered in the standard ERP system. You can use these as a basis for your own standard texts. These text templates are:

- MAIL_FOR_I0001_A (Change of personnel administrator for an employee)
- MAIL_FOR_I0001_B (Change of personnel officer for an applicant)

You can copy the text templates from client 000.

Create the standard texts that you require and store them under the text ID PAMA.

Each mail consists of a header and the actual message. Write the mail header in the first line of the standard text and then the message starting in the second line.

- You can use the fields of infotypes 0001 and 0002 to initiate sending the mail. If the infotype that triggers the mail is the *Organizational Assignment* infotype (0001), you can use the fields contained in the structures *P0001 (data before changes) and P0001 (data after changes).

The standard settings for style and layout are used in the mails.

Exercise 22: Optional: Dynamic Actions

Exercise Objectives

After completing this exercise, you will be able to:

- Set up a dynamic action

Business Example

The personnel administrators require a dynamic action that will remind them one month before the loan period is up on the laptop lent to an employee for a certain period. For this purpose, you should dynamically create the *Monitoring of Tasks* infotype.

Task:

Create a new dynamic action to monitor the loan of laptop computers to employees.

1. Create a separate subtype for the Objects on Loan infotype (0040). Use 90## for the subtype ID and Laptop ## for the name of the subtype.
2. Set up a dynamic action so that each time the *Objects on Loan* infotype (0040) with subtype 90## is changed or created, the *Monitoring of Tasks* infotype (0019) is created for the task type, that is, for the subtype *60 Expiry of probation*. The task in this infotype (P0019-TERMN field) should be derived from the end date of the *Objects on Loan* infotype (0040) (P0040-ENDDA field), that is, the end of the loan period.
3. The employee Winnie Chung, personnel number 540991##, borrows a company laptop for six months from today. Create a new record for the *Objects on Loan* infotype (0040) with subtype 90## for this employee. The system should automatically create a *Monitoring of Tasks* (0019) infotype record for the task type *60 Expiry of probation* where the task date is the same as the end date of the *Objects on Loan* infotype record.

Solution 22: Optional: Dynamic Actions

Task:

Create a new dynamic action to monitor the loan of laptop computers to employees.

1. Create a separate subtype for the Objects on Loan infotype (0040). Use 90## for the subtype ID and Laptop ## for the name of the subtype.

   a) *IMG: Personnel Management → Personnel Administration → Contractual and Corporate Agreements → Objects on Loan → Define objects on loan*

   b) Choose New entries and enter 90## for the subtype and Laptop ## as the name of the subtype.

   c) Save your data and return to the IMG.

2. Set up a dynamic action so that each time the *Objects on Loan* infotype (0040) with subtype 90## is changed or created, the *Monitoring of Tasks* infotype (0019) is created for the task type, that is, for the subtype *60*

Continued on next page

Expiry of probation. The task in this infotype (P0019-TERMN field) should be derived from the end date of the *Objects on Loan* infotype (0040) (P0040-ENDDA field), that is, the end of the loan period.

a) *IMG: Personnel Management → Personnel Administration → Customizing Procedures → Dynamic Actions*

b) Select *New entries*.

c) Enter the following data as your new table entries (see below for explanation):

Info-type	**Sub-type**	**F**	**FC**	**No.**	**Action**	**Variable Function Part**
0040	90##		06	01	I	INS,0019,60
0040	90##		06	02	W	P0019-TERMN=P0040-ENDDA

d) Explanation of the first line: If you change or create (function code 06) infotype 0040 and subtype 90##, an infotype record should be maintained (action I). The variable function part gives more detailed information: The *Monitoring of Tasks* infotype (0019) with subtype *60 Expiry of probation* should be created (INS).

e) Explanation of the second line: The following specification for the values of the new record (action W) should apply: in the *Task* field (P0019-TERMN) the date should be determined from the end date of the *Objects on Loan* (0040) infotype record (P0040-ENDDA).

3. The employee Winnie Chung, personnel number 540991##, borrows a company laptop for six months from today. Create a new record for the *Objects on Loan* infotype (0040) with subtype 90## for this employee. The

Continued on next page

system should automatically create a *Monitoring of Tasks* (0019) infotype record for the task type *60 Expiry of probation* where the task date is the same as the end date of the *Objects on Loan* infotype record.

a) Test the dynamic action.

b) In the SAP Easy Access menu, choose

c) *Human Resources → Personnel Management → Administration → HR Master Data → Maintain.*

d) Enter the personnel number of employee Winnie Chung (540991##)

e) Choose the *Objects on Loan* infotype (0040) and subtype *90## Laptop ##*.

f) Choose *Create* to create the data record. Specify today's date as the start date and the date in six month's time as the end date, that is, the end of the loan period.

g) Save the new infotype record.

h) This will automatically create the *Monitoring of Tasks* infotype (0019) based on the dynamic action that was created in the previous exercise.

i) Select *Enter*. The new infotype will have the following default information:

- Task type: *60 Expiry of probation Laptop*
- Task: the end date of the loan (derived from the end date of the *Objects on Loan* infotype (0040)).
- Reminder date: one month before the end of the loan period.

j) Select *Save*.

Lesson Summary

You should now be able to:

- Initiate different actions using a dynamic action: – Maintaining an additional infotype record – Sending a mail

Unit Summary

You should now be able to:

- Initiate different actions using a dynamic action: – Maintaining an additional infotype record – Sending a mail

Unit 16

Fast Entry of Actions

Unit Overview

The fast entry of actions is clarified here and the necessary steps are executed in Customizing.

Unit Objectives

After completing this unit, you will be able to:

- Describe how to carry out a fast entry action
- Describe Customizing for a fast entry action

Unit Contents

Lesson: FastEntry Actions

Lesson Overview

You can maintain an action very quickly for an employee using Fast Entry of Actions.

Lesson Objectives

After completing this lesson, you will be able to:

- Describe how to carry out a fast entry action
- Describe Customizing for a fast entry action

Business Example

The HR department in your company would like to optimize the time it spends on tasks that need to be performed repeatedly.

Using Fast Entry of Actions

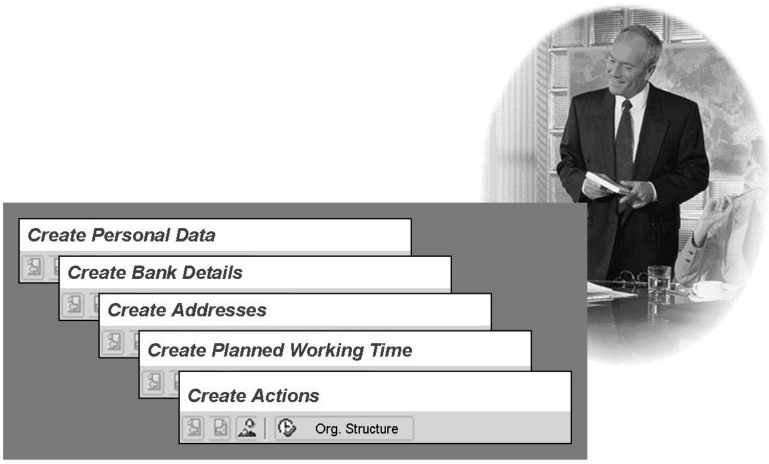


Figure 181: Using Fast Entry of Actions

You use fast entry of actions to speedily maintain the most important fields of several infotypes in the system for an employee. In this process, the system puts the fields of the various infotypes together on one screen for you to maintain. If you want to maintain one infotype only (for example, overtime for an entire department), you can also use fast entry.

Hiring multiple employees is an example of a fast entry action.

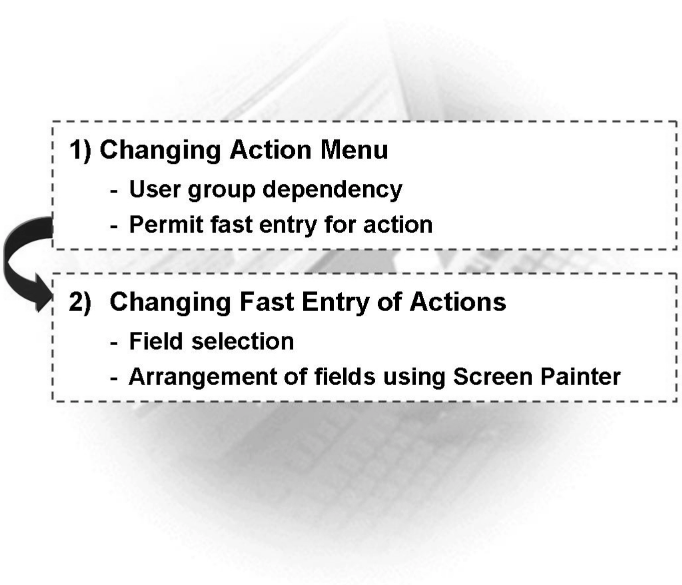


Figure 182: Customizing Fast Entry of Actions

To permit fast entry for an action, you must first specify this in the action menu.

You can call an existing fast entry action in the IMG activity “Change Fast Entry of Actions”, and then modify the arrangement of the fields and the fields used for fast entry in this action.

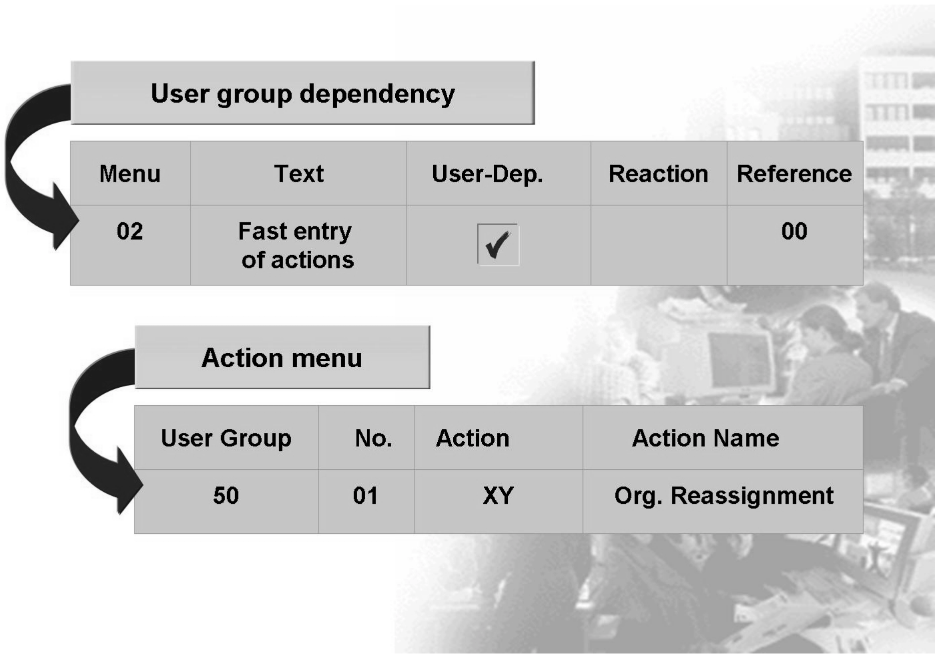


Figure 183: 1) Changing the Actions Menu

In the IMG activity *Change Action Menu*, the *User Group Dependency*option allows you to specify whether the menu for fast entry of actions should be user group dependent or user group independent. You can also specify whether a reference user group exists.

In the Action Menu activity, you can provide the user with various actions for fast entry depending on user group.

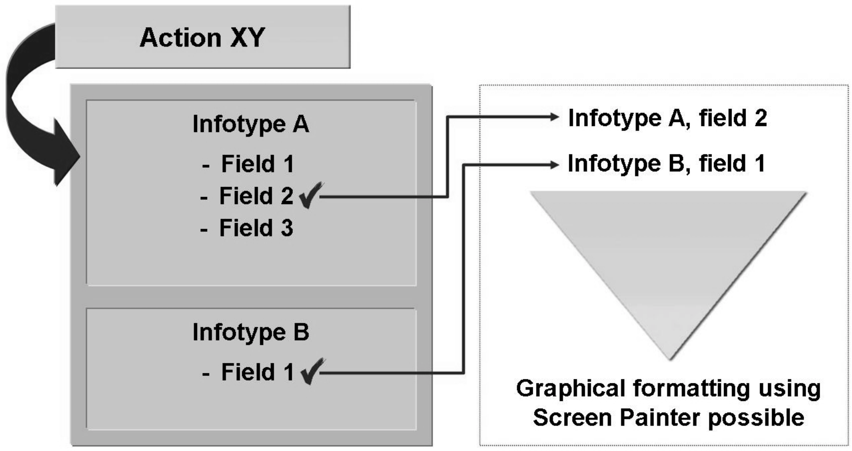


Figure 184: 2) Changing Fast Entry of Actions

In the IMG activity *Change Fast Entry of Actions*, you specify which fields from which infotypes you want to provide the user with for fast entry.

The user can then adjust the fast entry screen to his or her requirements using the Screen Painter.

Lesson Summary

You should now be able to:

- Describe how to carry out a fast entry action
- Describe Customizing for a fast entry action

Unit Summary

You should now be able to:

- Describe how to carry out a fast entry action
- Describe Customizing for a fast entry action

Unit 17

Global Employment

Unit Overview

An employee being sent to another country is discussed in this section. The participant should become acquainted with the individual phases of the global assignment.

Unit Objectives

After completing this unit, you will be able to:

- Name the terms related to Global Employment
- Specify support in the “Planning a Global Assignment” phase
- Specify support in the “Preparation for Relocation” phase
- Specify support in the “Transfer” phase
- Specify support in the “Duration of Global Assignment” phase
- Specify support in the “Repatriation” phase

Unit Contents

Lesson: Global Employment

Lesson Overview

Global Employment

- Terms related to Global Employment
- Planning a Global Assignment
- Preparation for Relocation
- Transfer
- Duration of Global Assignment
- Repatriation
- Payroll for Global Employees

Lesson Objectives

After completing this lesson, you will be able to:

- Name the terms related to Global Employment
- Specify support in the “Planning a Global Assignment” phase
- Specify support in the “Preparation for Relocation” phase
- Specify support in the “Transfer” phase
- Specify support in the “Duration of Global Assignment” phase
- Specify support in the “Repatriation” phase

Business Example

You should familiarize yourself with the individual phases of Global Employee Management.

General

Global Employment - Terms

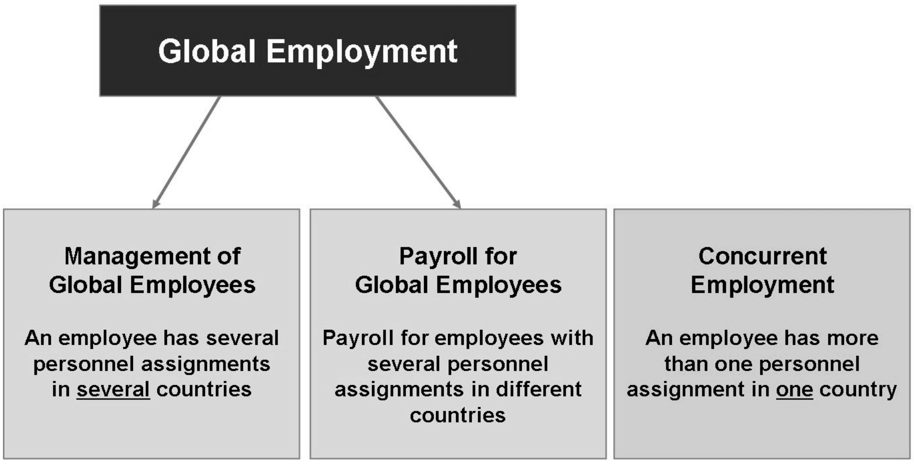


Figure 185: Global Employment - Terms

The following components come under the superordinate term Global Employment:

An employee has various personnel assignments in different countries in Management of Global Employees.

The payroll solution for Global Employment is called Payroll for Global Employees

There is also the additional component Concurrent Employment for when an employee has several personnel assignments in one country. The person ID concept is the same as for Management of Global Employees. Concurrent Employment is only released for some countries.

Examples: Concurrent Employment

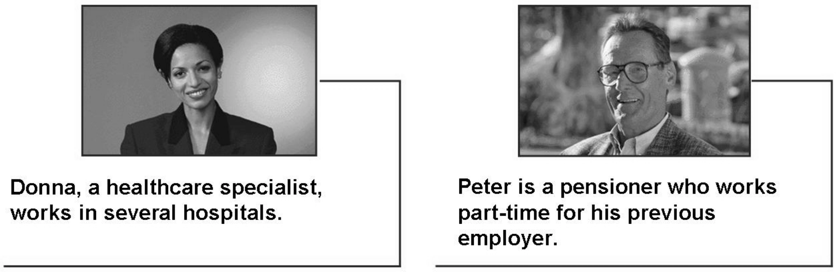


Figure 186: Examples: Concurrent Employment

Here are two examples where Concurrent Employment can be used.

Example: Global Employee

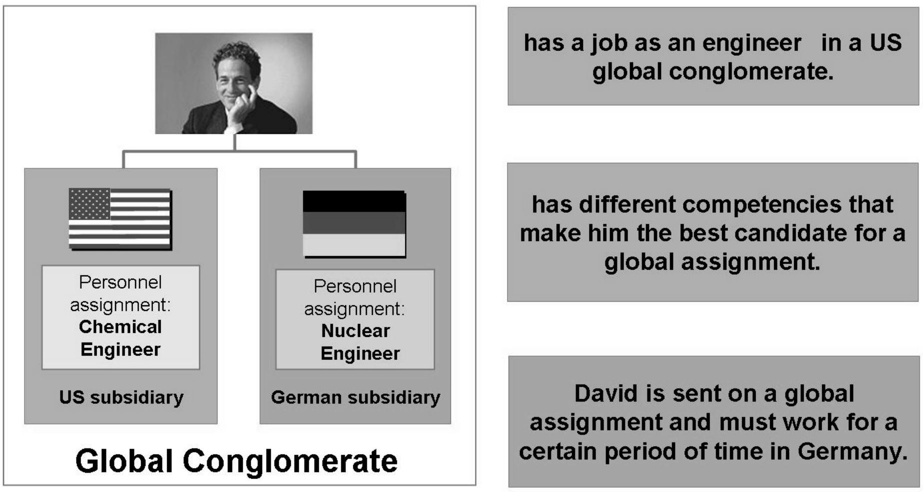


Figure 187: Example: Global Employee

Management of Global Employees is available as of SAP R/3 Enterprise - HR Extension 1.1.

A global employee can complete one or multiple global assignments for his or her global company.

The Concurrent Employment Model in mySAP HR shows the relationship between employee and employer. The most important concepts in the management of global employees are as follows:

- Each employee can have several personnel assignments, each in a different country.
- Each personnel assignment is linked to the person.

A personnel assignment outlines the activities that the person is to perform, the country of the global assignment, and additional features. Therefore a unique personnel number is assigned to each personnel assignment in mySAP HR.

Concurrent Employment Model

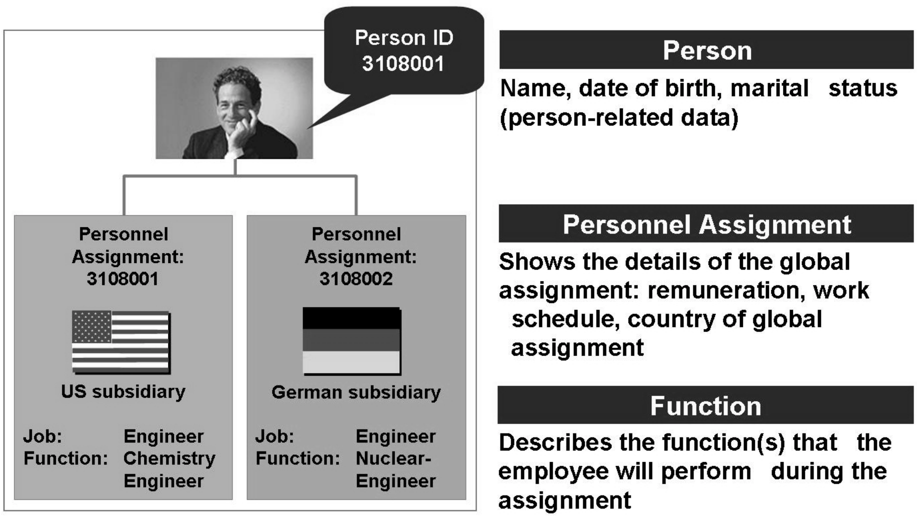


Figure 188: Concurrent Employment Model

With the person ID, you can track the global employee throughout his or her time of employment period in the entire company. The person ID can be assigned alphanumerically.

The person ID is stored in the “Person ID” infotype (0709). This infotype can be maintained just like all other infotypes. We recommend however, that the person ID may only be changed by end users in exceptional cases. Since the infotype exclusively contains the person ID, the authorization for this infotype should be controlled.

Of course after productivity has begun, no changes should be made to the creation rule for person IDs.

Before the person ID is activated, you must ensure that the “Person ID” infotype (0079) is valid for all personnel assignments in the system. You can do this by running the report “HR_CE_GENERATE_PERSONID_EXT”.

The Person ID Concept

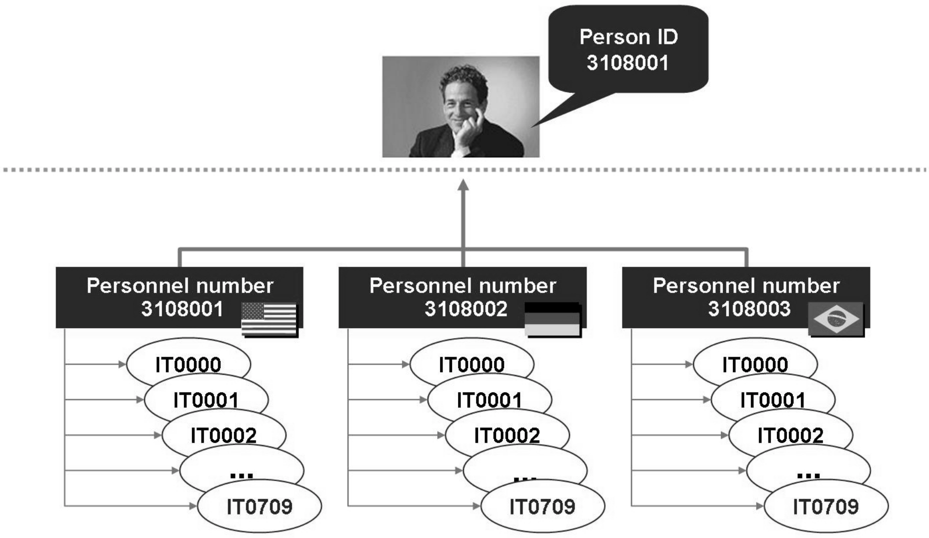


Figure 189: The Person ID Concept

In the infotype 0709, the personnel number (personnel assignment number) is linked to a person ID.

The person ID number can contain 20 places and is alphanumeric. The number can either be assigned manually by the user or automatically by the system.

The Individual Phases

Global System Settings

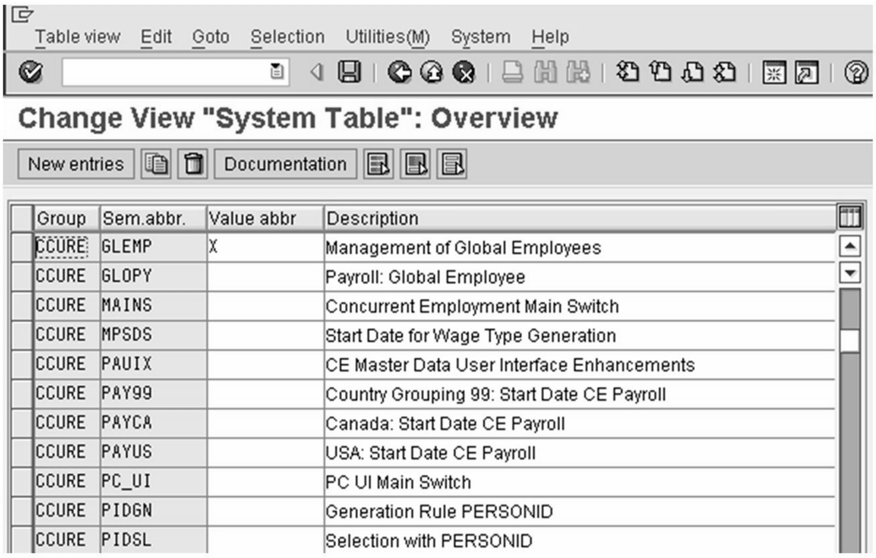


Figure 190: Global System Settings

Before Global Employment is activated, SAP makes sure that implementing it would be useful. To this end, customers request a questionnaire from SAP and send it back when they have completed it. SAP then provides specific advice about what should be taken into account (Notes 540451 and 662136).

The central switches for setting up Global Employment can be set in table T77S0. The following switches are particularly important:

- **CCURE GLEMP**: You can activate *Management for Global Employees* with the switch CCURE GLEMP. This switches on the new infotype framework and activates the infotype 0709 "Person ID".
- **CCURE GLOPY:** You can activate *Payroll for Global Employees* with this switch. When the switch CCURE GLOPY is switched on, SAP R/3 automatically sets the switch CCURE PAUIX.
- **CCURE MAINS:** Activates the enhanced functions for Concurrent Employment. Activating this switch usually requires further activities and frequently also table conversions.
- **CCURE PAUIX:** The following functions are activated or deactivated using the switch CCURE PAUIX:
  - List box display for the contract information on the Personnel Administration initial screens and on the list screens
  - Employee recognition for hiring action
- **CCURE PIDGN:** Controls the generation rule for the structure of the external person ID (4 different options)
- **CCURE PIDSL**: To use the person ID for entry to the maintenance of employee data, the switch CCURE PIDSL has the specification 'X'. All users are able to deactivate the use of the person ID on the initial screen by setting the parameter HR_CCURE_PIDSL in their user profiles to '-' (minus).

Phases in the Management of Global Employees

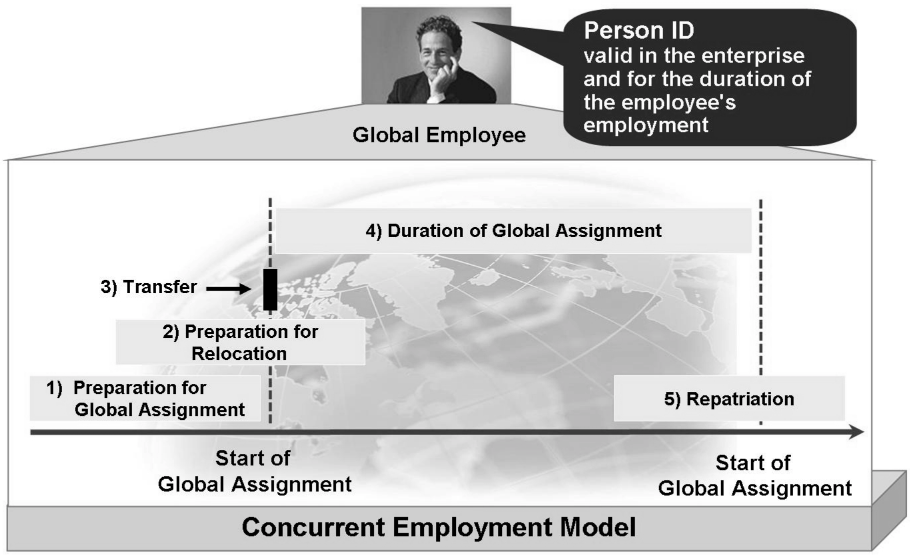


Figure 191: Phases in the Management of Global Employees

Global Employment has five separate phases:

- Planning a Global Assignment
- Preparation for Relocation
- Transfer
- Duration of Global Assignment
- Repatriation

Instead of the previous personnel number, there is a person ID number when using Global Employment, under which employees have multiple employment assignments.

Global Employment does not support selecting employees who are particularly suited to a global assignment.

Planning a Global Assignment

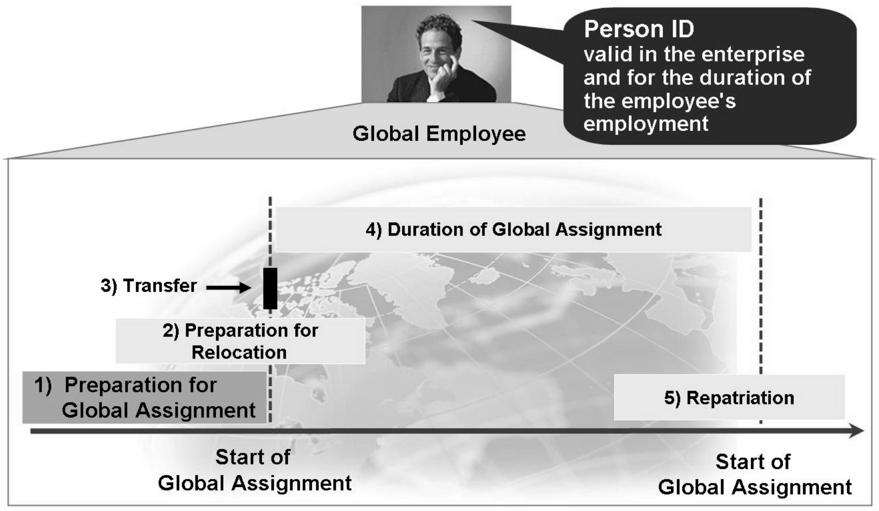


Figure 192: Planning a Global Assignment

Depending on the foreign assignment policy in your company, you can record all important data and create a global assignment:

- Type, Duration and Status of the Assignment
- Information regarding family
- Information regarding salary and compensation plan

An offer is created.

All those involved (manager in home country, employee, manager in the subsidiary abroad) have access to the same information.

The planning process for a global assignment can be modified according to the foreign assignment policy of your company.

Overview of Personnel Assignments

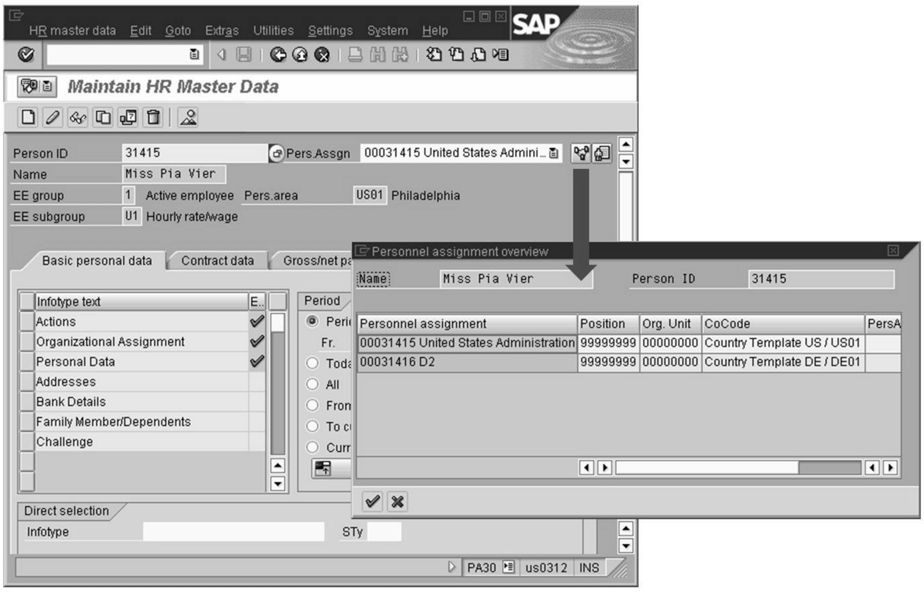


Figure 193: Overview of Personnel Assignments

If the selection occurs using the person ID, the system must know which personnel assignment the user wants to access.

The desired global assignment can be selected from the personnel assignment listbox.

Maintain the “Name of the personnel assignment” (V_T587C_T) in the Implementation Guide, to select the desired fileds and layout settings.

Table Maintenance is simple and is similar to the Details screen. Ensure that the results fit into one line per foreign assignment.

The Overview of Personnel Assignments dialog box should provide a brief overview of the existing personnel assignments.

Personnel Action I

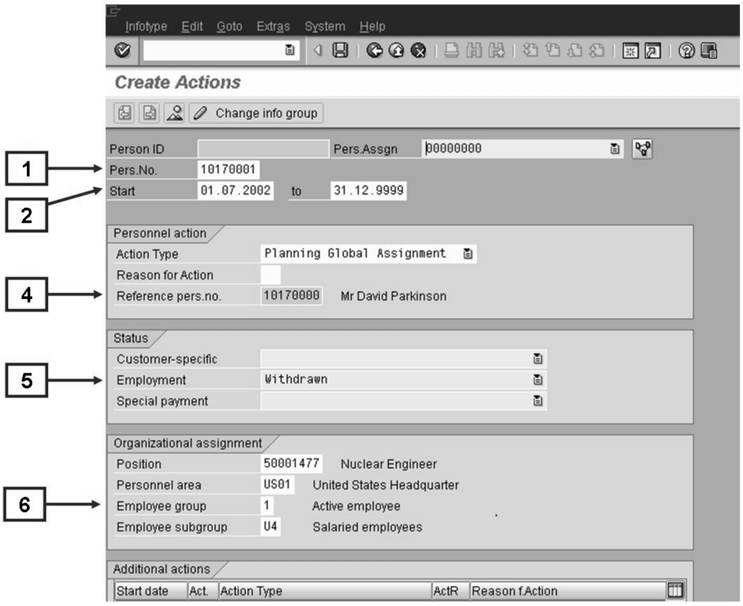


Figure 194: Personnel Action I

When a suitable employee has been found for a global assignment, the action “Planning Global Assignment” must be carried out for him or her. This action is already planned in the system, but must be included when needed in the Action Menu (see the unit Personnel Actions).

Follow the steps below to plan a global assignment:

1. Enter the personnel number. Depending on the settings, this can be manually entered or proposed by the system. The number is the number of the global assignment.
2. “Valid” refers to the planned start date of the global assignment
3. Choose Foreign Service Preparation as the action type.
4. The personnel reference number has nothing to do with and is not used in the Management of Global Employees.
5. The action has the status “withdrawn”, which means that the system recognizes this action as a “planned” action.
6. You can enter the planned organizational assignment for the global employee in the new global assignment.

Personnel Action II

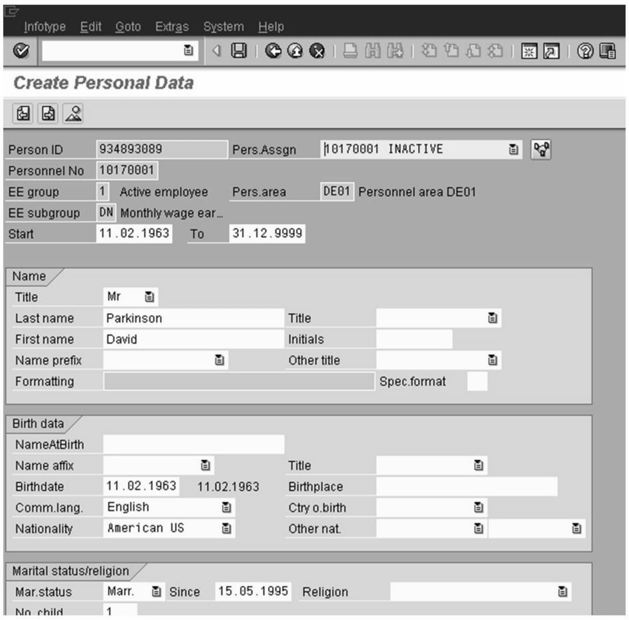


Figure 195: Personnel Action II

1. The header shows that this infotype is saved under the country grouping Germany (the country to which the employee is being sent). Ensure that the personnel assignment is configured to display this action as inactive. Although country-specific infotypes cannot be used in other countries, the "international part" of the infotype is defaulted from the infotype that already exists for the employee in the home country.

However, it is possible that in the infotype “Personal Data” other country-specific data must also be entered.

Depending on the information required by that country, additonal data may have to be entered.

Additional infotypes:

The main characteristics of the global assignment are determined in the infotype 0710. The information displayed here depends on your Customizing settings, which should reflect the foreign assignment policy of your company.

You can control the decison process in terms of the planned assignment using the Preparation of Global Assignment infotype. You can set the status required and change it according to the decision.

Compensation Package

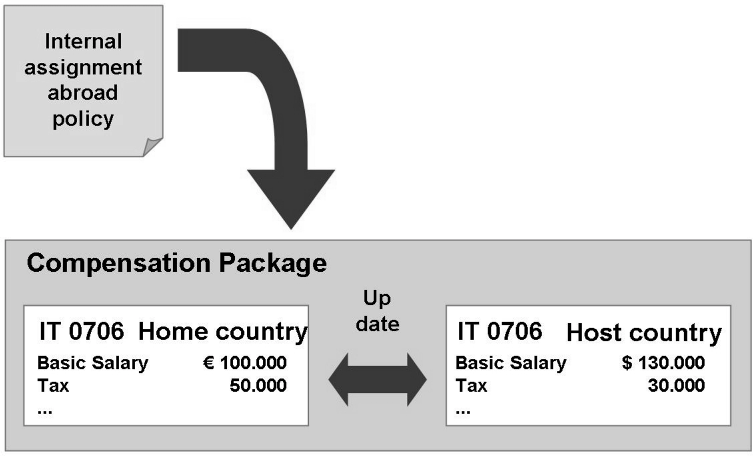


Figure 196: Compensation Package

The most important decision to make regarding a global assignment concerns the compensation package.

The compensation package is created using the Compensation Package Offer infotype (0706), which has two subtypes, one each for the home and host country. However, the system takes both into account as a large information package.

If an item is changed in the host country subtype, this can influence the values of several items in the home country subtype, depending on the Customizing settings. The Customizing settings should reflect the foreign assignment policy of your company.

A new infotype package is created if one of the two infotypes is changed during the negotiations.

Example of a Calculation of a Compensation Packet

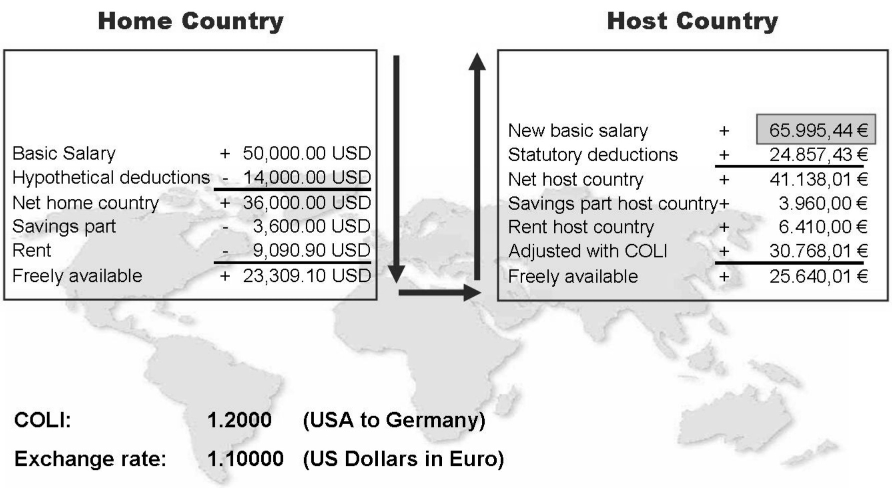


Figure 197: Example of a calculation of a compensation packet

If you wish, you can use the system to help calculate how high the basic salary should be for the employee in the country. For this, country-specifics such as tax deductions, cost signs and so on have to be taken into account.

Offer Letter

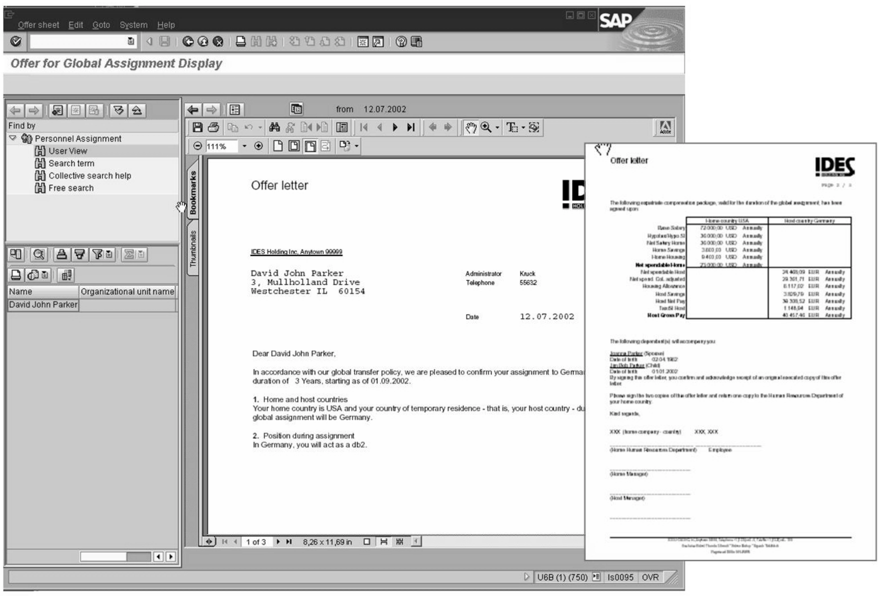


Figure 198: Offer Letter

After a suitable employee has been chosen, an offer letter based on a Word template can be produced.

2) Preparation for Relocation

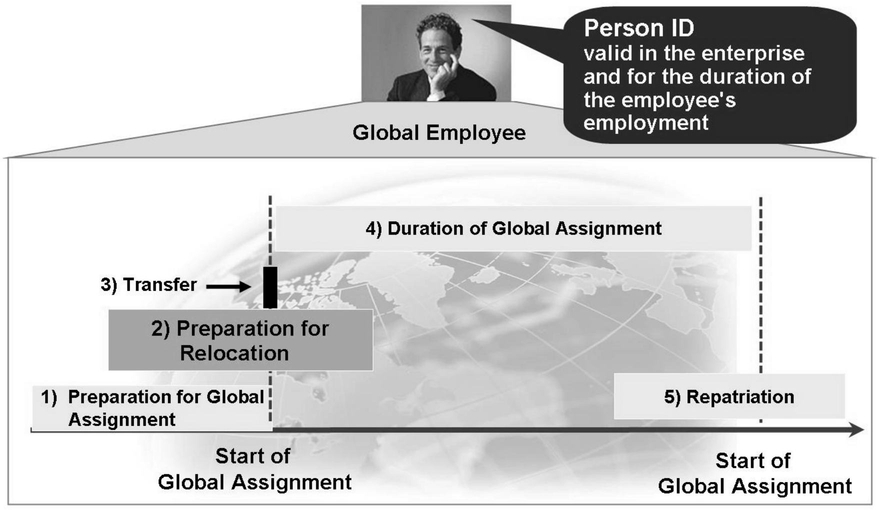


Figure 199: 2) Preparation for Relocation

Making flight reservations, applying for work and residency permits for the employee and his or her family, booking language courses, and so on.

The progress of this process can be monitored using the check list.

All those involved can display information applicable to them in the format desired using the different views of this check list to monitor the process.

Check List

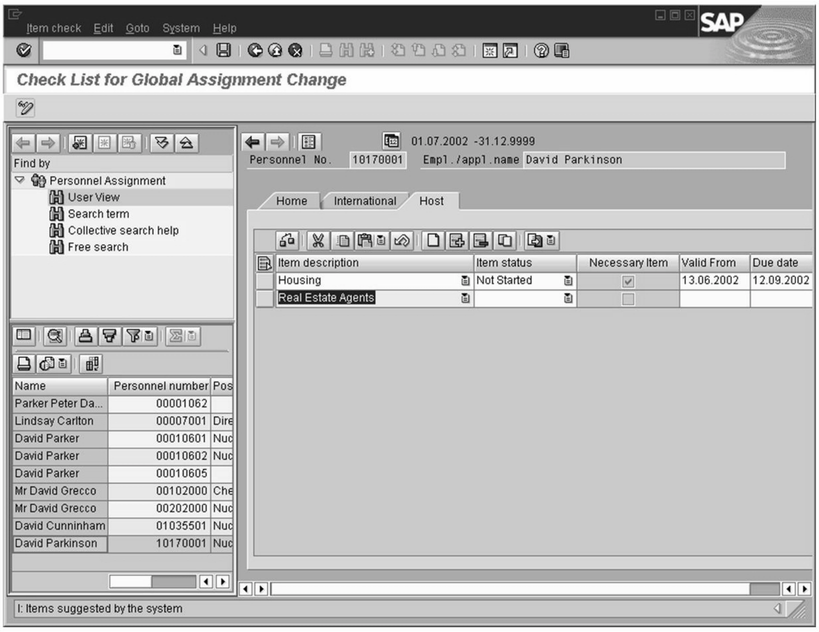


Figure 200: Check List

The international administrator can only process the check list for the global employees assigned to him or her.

The information is stored in the Check List Items infotype (0705).

Depending on your Customizing settings, you can set the items so that they are executed in the home country, host country, or in the international department. For each item, you must determine whether it is a prerequisite for the transfer, that is, whether it must be “completed” before the transfer.

3) Transfer

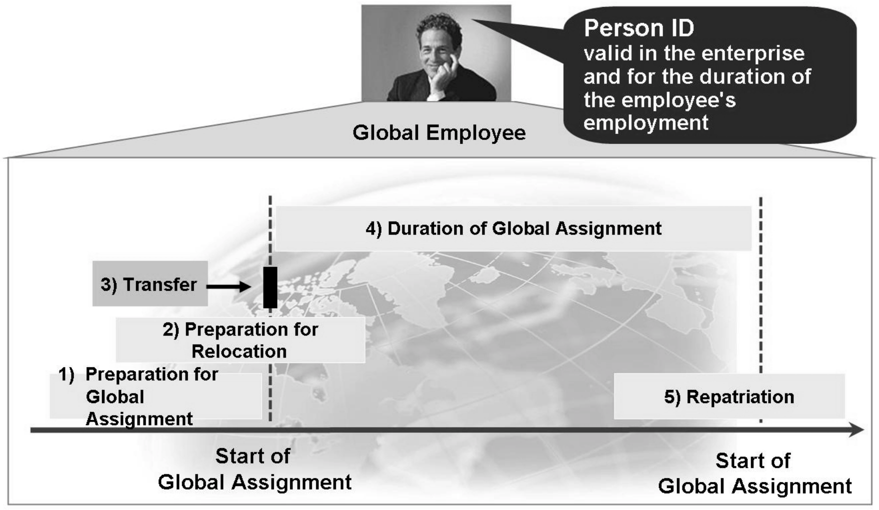


Figure 201: 3) Transfer

The decision was made for the global assignment to go ahead.

The assignment is activated in the home and host country.

Additional data is created or changed depending on the conditions agreed in the final offer.

The Basic Pay (0008), Recurring Payments and Deductions (0014), and Additional Payments (0015) infotypes are transferred from the Compensation Package infotype.

Technically, this is mapped through the two actions “Glob.Employ.Act.HostCountry” und “Glob.Employ.Act.HomeCountry”.

4) Duration of Global Assignment

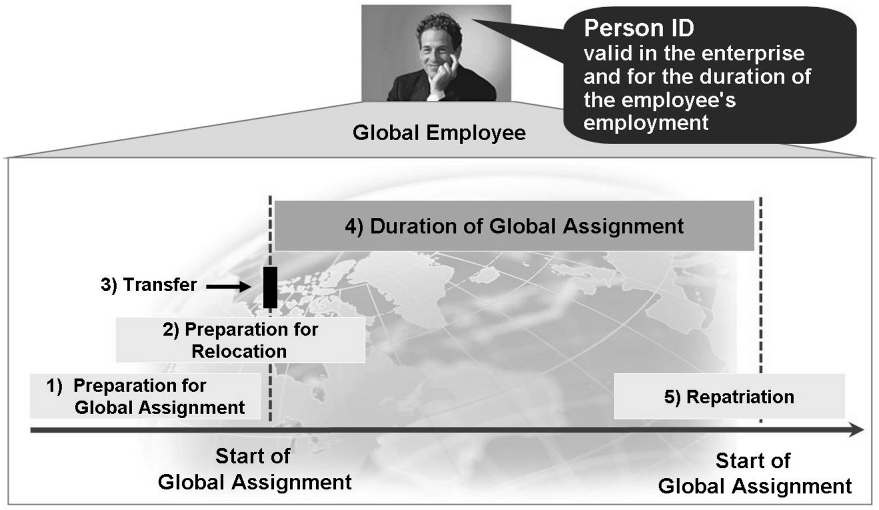


Figure 202: 4) Duration of Global Assignment

Payroll for the employee runs during the period abroad.

Payroll in Global Employment Area

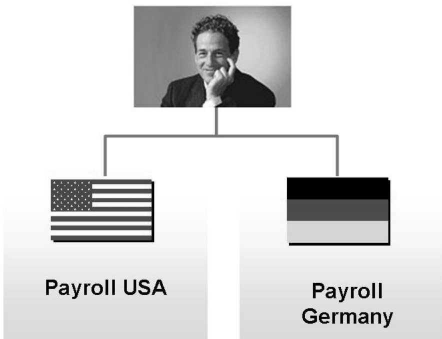


Figure 203: Payroll in Global Employment area

Payroll

Payroll can take place either in the host country or in the home country only, or in both. The latter may be necessary when, for example, an employee makes pension contributions in Germany despite working in another country. In this case, so-called shadow income from the Basic Pay infotype is used.

Among other things, you must consider that payroll periods and currencies may be different in different countries, and wage types may be customized in such a way that they are only valid in one or other country.

Moreover, registering the residency types can determine how much time was actually spent in the host country (this is important for establishing in which country taxation must take place).

5) Repatriation

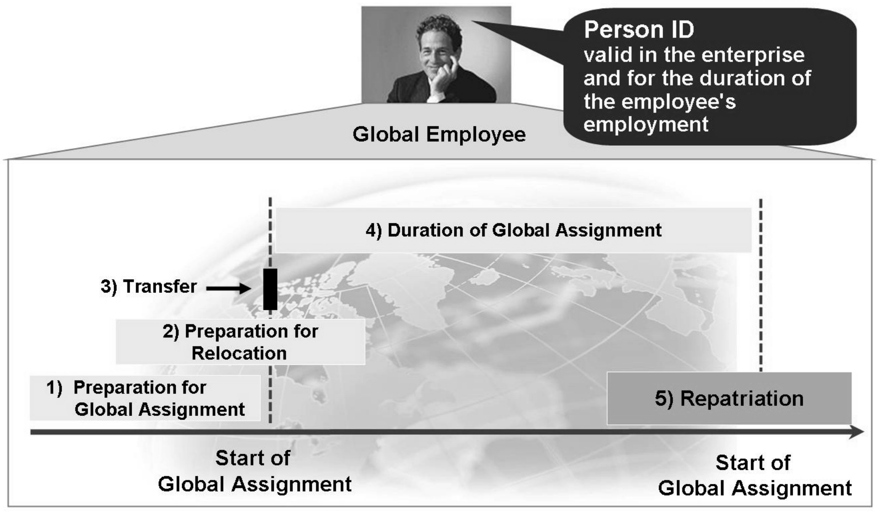


Figure 204: 5) Repatriation

A new global assignment must be assigned to the global employee before completion of the global assignment.

The global employee can either return to his or her home country or start a new global assignment.

The relocation process starts again from the beginning.

Lesson Summary

You should now be able to:

- Name the terms related to Global Employment
- Specify support in the “Planning a Global Assignment” phase
- Specify support in the “Preparation for Relocation” phase
- Specify support in the “Transfer” phase
- Specify support in the “Duration of Global Assignment” phase
- Specify support in the “Repatriation” phase

Related Information

- Through a URL or cross-reference tag, point out additional information that the participants may find useful, such as Web sites or white papers. Delete it if not applicable.

Unit Summary

You should now be able to:

- Name the terms related to Global Employment
- Specify support in the “Planning a Global Assignment” phase
- Specify support in the “Preparation for Relocation” phase
- Specify support in the “Transfer” phase
- Specify support in the “Duration of Global Assignment” phase
- Specify support in the “Repatriation” phase

Unit 18

HR Administrator and Employee Interaction Center

Unit Overview

Unit Objectives

After completing this unit, you will be able to:

- Describe portal role HR Administrator
- Describe Employee Interaction Center

Unit Contents

Lesson: HR Administrator

Lesson Overview

[Give a short overview of lesson.]

Lesson Objectives

After completing this lesson, you will be able to:

- Describe portal role HR Administrator

Business Example

[Explain to participants about the practical use of this lesson for a company using a business example.]

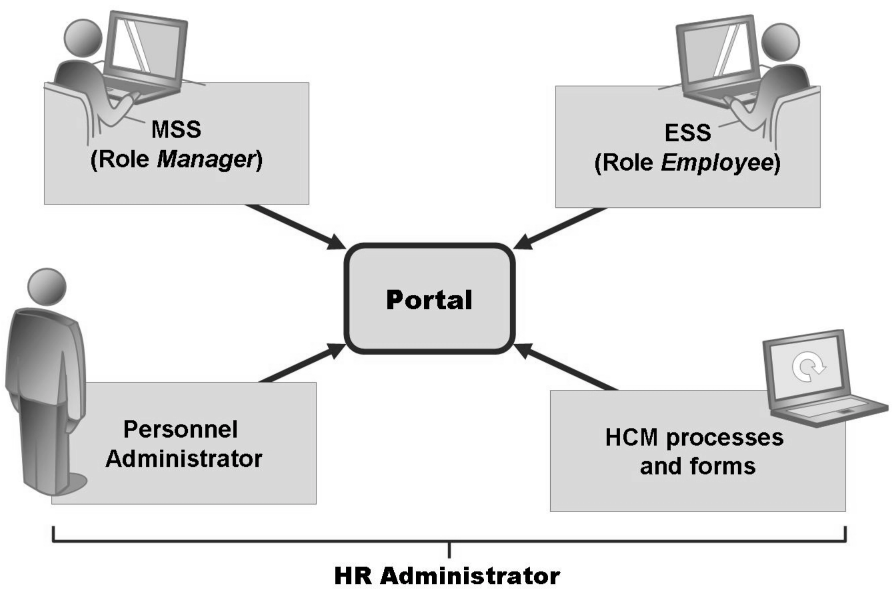


Figure 205: Role HR Administrator

HR – Administrator is another role in the portal which gives an administrator various options according to authorization. These include especially:

- Maintain employee data
- Process processes that are triggered via workflows (if necessary, attachments also possible)
- Various Evaluations

HR Administrator – Display and Maintain Master Data

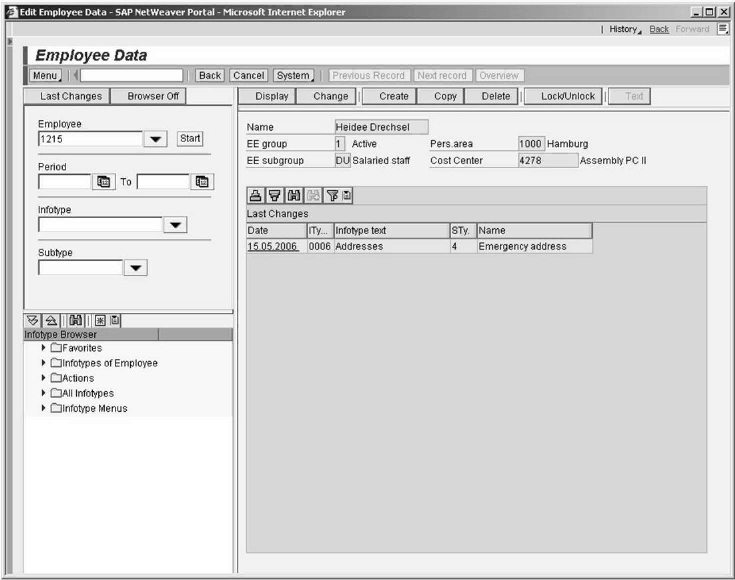


Figure 206: HR Administrator – Display and maintain master data

Alongside the original goal of HR Administrator to display employee data like in the traditional SAP system and maintain it using infotypes and actions, the main focus is on processes and reporting.

HR Administrator – Trigger/Further Process/Complete Processes

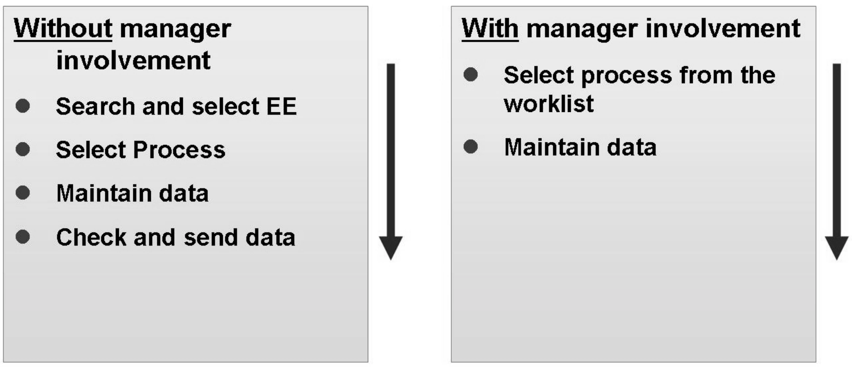


Figure 207: HR Administrator – Trigger/further process/complete processes

Many examples that turn up particularly frequently in practice are delivered by SAP as project templates. In addition, you can create and define your own processes with any amount of steps and any role assignment.

As part of HR Administrative Services, the universal worklist makes the current work items available which the system has generated in the course of processing a process within HCM Processes and Forms.

HR Administrator – Ex. Process "Transfer of an Employee" Without Involvement of a Manager

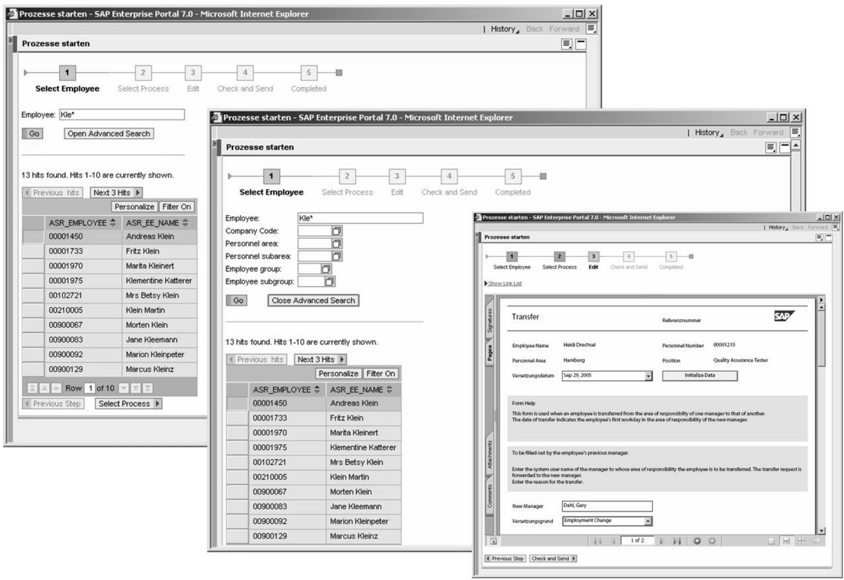


Figure 208: HR Administrator – Ex. Process "Transfer of an Employee" Without Participation of a Manager

If HR Administrators trigger the process themselves (Process Without a Manager) they proceed in the following way:

- Searching the employee
- Searching the process
- Maintaining data
- Storing data

HR Administrator – Ex. Process "Transfer of an Employee" With Involvement of Several Managers I

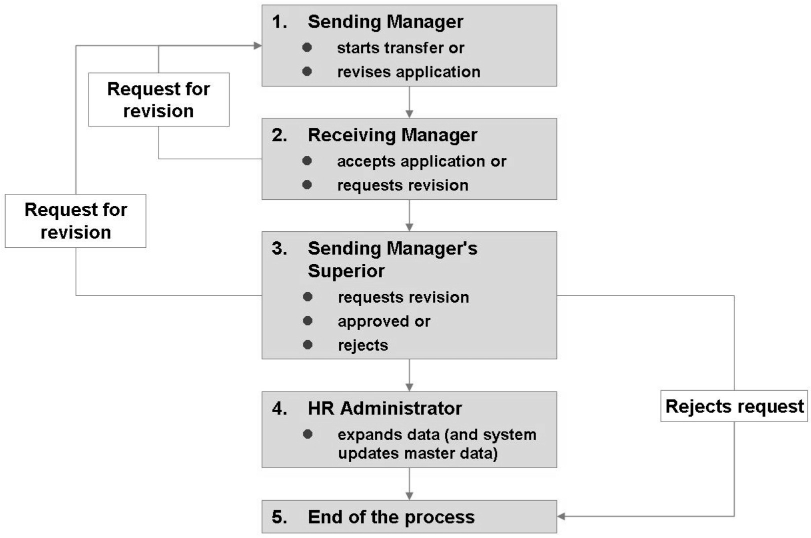


Figure 209: HR Administrator – Ex. Process "Transfer of an Employee" With Participation of Several Managers I

In the process described above, the transfer of an employee is shown. The process *Transfer* supports the organisational change of an employee to a new position that falls outside the area of responsibility of the current manager. After carrying out the process, the master data of the employee concerned is updated. The business roles *Sending Manager*, *Receiving Manager*, *Superior of Sending Manager* and *HR Administrator* play an active part in carrying out the process. The employee concerned is informed of the process by email.

The process *Transfer* accelerates and optimizes the processing of a transfer, because the cross-role system integration guarantees the fastest possible forwarding of work items and communication without gaps between all parties concerned.

HR Administrator – Ex. Process "Transfer of an Employee" With Involvement of Several Managers II

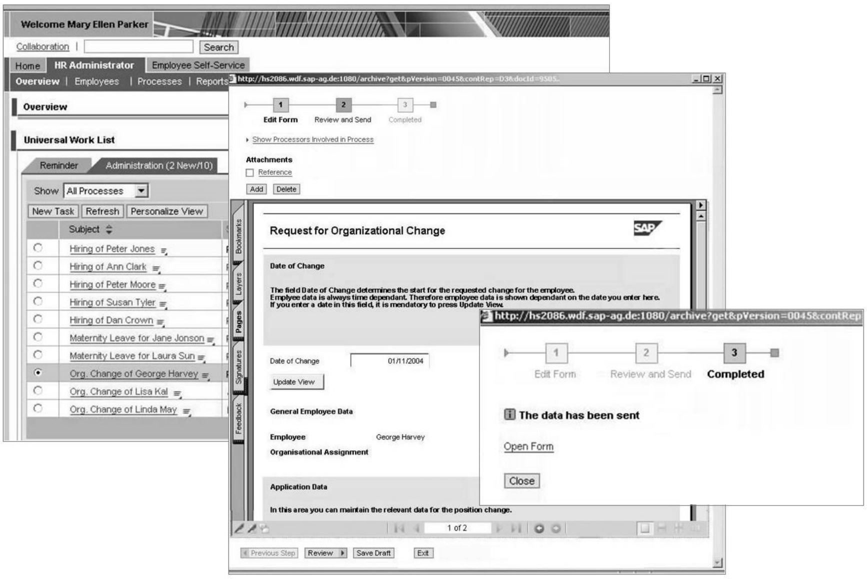


Figure 210: HR Administrator – Ex. Process "Transfer of an Employee" With Participation of Several Managers II

Here you see the Administrator view. HR Administrators see a work item displayed in their worklist.

They maintain the corresponding data and save them.

Lesson Summary

You should now be able to:

- Describe portal role HR Administrator

Related Information

Lesson: Employee Interaction Center (EIC)

Lesson Overview

[Give a short overview of lesson.]

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Employee Interaction Center

Business Example

[Explain to participants about the practical use of this lesson for a company using a business example.]

- **Reduce HR costs**
- **Maintain or improve service quality**
- **Use resources in HR more efficiently**
- **Create service transparency in HR**
- **Optimize accessibility**
- **Responsibilities not always clear**
- **Efficiency of communication contacts**
- **Consistency in HR service requests**

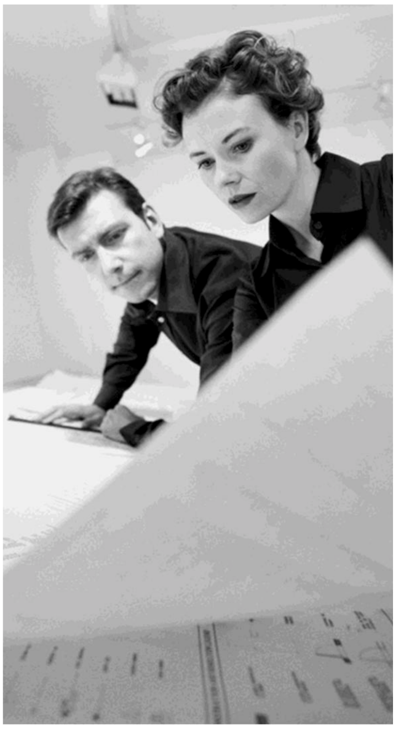


Figure 211: Employee Interaction Center (EIC) Requirements

The Employee Interaction Center allows you to harmonize the above mentioned requirements with your actual business processes. The goal of this is to minimize the effort involved by standardizing and automating processes and their central processing without any subsequent loss of quality.

The following advantages are gained from introducing the EIC:

- Improvement of service quality
- Fast and service-oriented resolution of employee queries supported by solution databases, contact history, and so on.
- Single contact point for various channels of communication such as telephone, email, workflows, incoming ESS/MSS, fax, and post
- Reduction in costs for HR services
- Increased efficiency and cost transparency
- Support of integrated and standardized HR processes, including the agreement of Service Level Agreements
- Bundling and more efficient use of HR resources
- Automation of the processes
- Integration of Employee Self Services and Manager Self Services using the SAP portal

The easy-to-use, interactive interface plays a role in achieving goals quickly

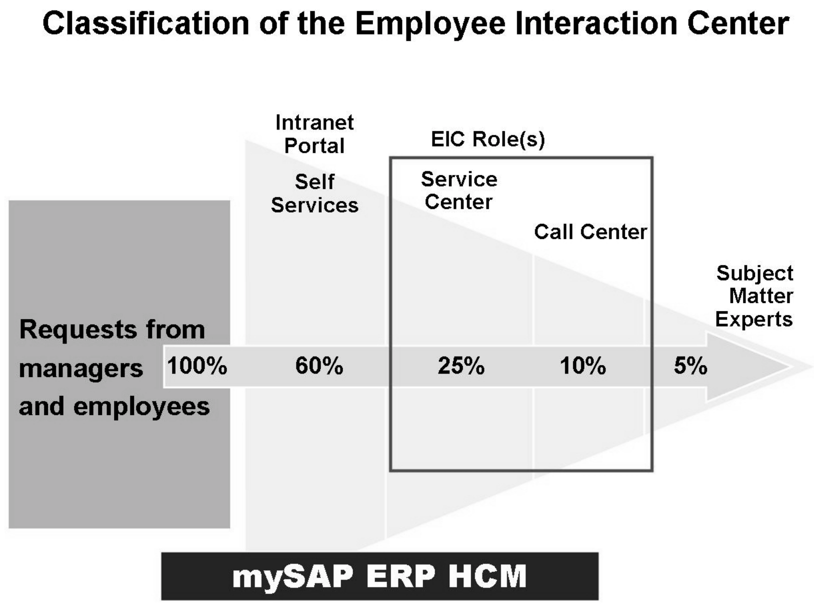


Figure 212: Employee Interaction Center Classification

The aim of integrating an EIC is firstly so that as many tasks as possible can be dealt with by self services. This includes processes such as leave requests, company insurances, and so on.

If this is not possible, perhaps because the employee has further queries, or an activity has to be revised again (for example, travel request), the EIC is used. This can happen, for example for activities such as organizational change, transfer to another country, and so on. In the EIC, the service center represents a first level support that carries out most tasks.

The EIC can continue to process the activity whilst physically separate from the trigger.

Complicated special tasks are forwarded to the advice center (second level support).

Only if the task cannot be dealt with in the EIC do subject matter experts, or HR strategists in the last instance, intervene.

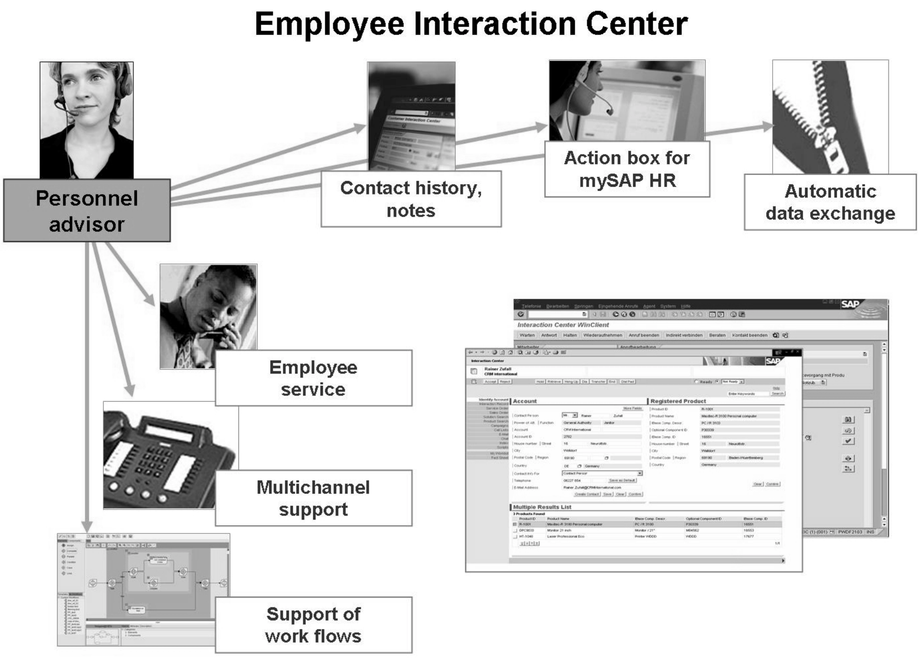


Figure 213: Employee Interaction Center

Employees can contact the EIC in a variety of ways including telephoning directly.

Within the EIS, work flows are supported through the option of forwarding tasks from the service center to the advice center.

The personal advisor can use a contact history to obtain precise information about the employee's previous contacts and issues.

To perform certain tasks, they can use the standard functions of my SAP ERP, such as master data maintenance. For this they go from the EIS to the relevant transactions in HCM and back again. Data is also exchanged from the EIC (mini data master) with data from HCM via ALE in real time or at regular intervals.

Inbound Call – Asset Contact, Description

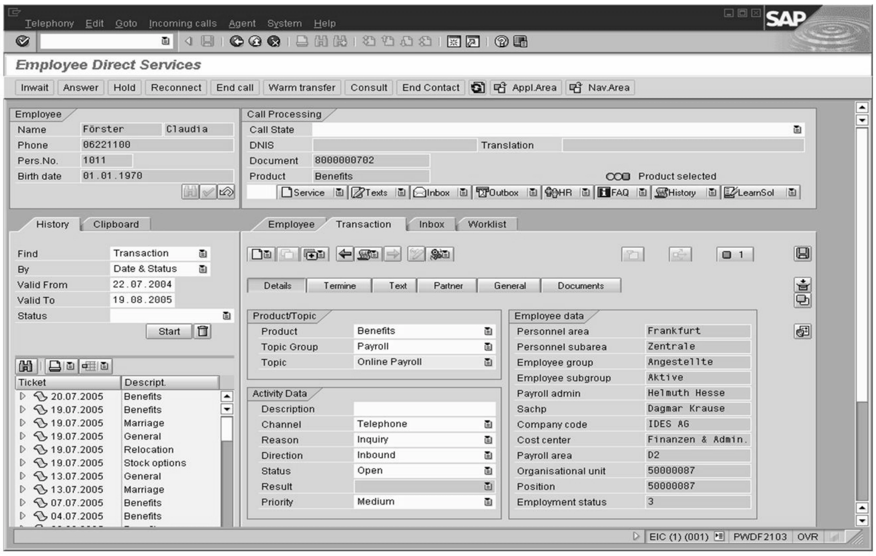


Figure 214: Inbound Call – Asset Contact, Description

The graphic shows a typical screen that is available to the HR advisor in the EIC. After the employee has been selected (above left), historical data about the employee is shown (bottom left).

After this, a new activitiy for example can be recorded (bottom right).

Lesson Summary

You should now be able to:

- Describe Employee Interaction Center

Unit Summary

You should now be able to:

- Describe portal role HR Administrator
- Describe Employee Interaction Center

Unit 19

Case Study

Unit Overview

In an exercise at the end of the course, the participant has the chance to assess how much he or she has learnt .

Unit Objectives

After completing this unit, you will be able to:

- Understand better the content of this course by completing the exercises

Unit Contents

Lesson: Case Study

Lesson Overview

The detailed exercise in the case study enables you to put the most important concepts of this course into practice once more.

Lesson Objectives

After completing this lesson, you will be able to:

- Understand better the content of this course by completing the exercises

Business Example

Different problems occur within your company that you have to solve

Hint: This case study is divided into individual exercises. The individual exercises are self-contained. All exercises are optional, except for the first exercise. If you find that you do not have enough time to complete all the exercises, concentrate on those exercises that are most relevant to your business practice.

You are not provided with a perfect solution to the case study since the aim of the case study is to test your own knowledge. First try to complete the exercises without any additional help. If you have any difficulties, refer to the notes at the end of the relevant exercise. Should you still have difficulties, your instructor is, of course, at your disposal.

Business scenario:

Your company has bought another company. This new subsidiary (located on another site) manufactures and sells mopeds.

Exercise 1: Your company structure has changed through the purchase of this subsidiary: You need to create a new personnel area MP## under the CABB company code. This personnel area should have a similar structure to personnel area PA00, but without its own head office.

Note: For notes on completing this exercise, see the unit on “Enterprise Structure”.

Exercise 2: * You need to hire a new employee for your part of the company from the first of this month. Use the hiring action HR305 with the following basic data:

Personnel number: **305995##**

Company code: **CABB**

Personnel area: **MP##**

Personnel subarea: **Production**

EE group: **Active**

EE subgroup: **##**

Position: **99999999**

Work schedule rule: **Norm**

Pay scale type: **90**

Pay scale area: **50**

Pay scale group: **E01**

Pay scale level: **01**

Wage type: **M000**

You can make entries of your choice for any data that has not been specified explicitly.

Note: For notes on completing this exercise, see the unit on "Hiring an Employee".

Exercise 3: * Your company has decided to adjust certain default values and selection options especially for the new production plant.

1. In Organizational Management, store the following data in the "## Production" organizational unit for the "## Production Worker B" position as of the first of this month:

   EE group: **Active**

   EE subgroup: **##**

   Company code: **CABB**

   Personnel area: **MP##**

   Personnel subarea: **Production**

   Hint: You find the "## Production" organizational unit under the following path: *Training International* → *Production* → *## Production*

   For notes on completing this exercise, see the unit on "Organizational Structure".

2. The new production plant should have a new pay scale type. You need to create this new pay scale type. The key of the new pay scale type should be 50 + ##.

   Note: For notes on completing this exercise, see the unit on "Remuneration Structure".

3. In the relevant table (NOT in the feature), enter the following values as default values for an employee in personnel area MP## and personnel subarea Production: 50 + ## for pay scale type and 70 + ## for pay scale area.

   Note: For notes on completing this exercise, see the unit on "Remuneration Structure".

4. In the pay scale table, enter meaningful entries for hourly wage earners between 8 and 20 euro for pay scale type 50 + ## and pay scale area 70 + ##. Use the pay scale group E01 and pay scale levels 01 to 04.

   Note: For notes on completing this exercise, see the unit on "Remuneration Structure".

5. The payroll should be run for all the employees in your new production plant together, separate from all other employees. Create a new payroll area with the key 60 + ##. The payroll should be run monthly.

   Note: For notes on completing this exercise, see the unit on "Additional Organizational Assignment".

6. A new administrator group should be responsible for the employees in the new production plant. Create a new administrator group called MP## and a new administrator M##.

   Note: For notes on completing this exercise, see the unit on "Additional Organizational Assignment".

7. In your new company, you want to record whether an employee is a craftsman or a master craftsman. In the appropriate Customizing table, make the entries Moped Craftsman ## and Moped Master ##.

   Note: For notes on completing this exercise, see the unit on "Additional Organizational Assignment".

8. Set up a new wage type Hourly Wage Moped ## with the ID ##50. You can use wage type MM10 as a template.

   Customize the wage type so that the value is taken from the pay scale table. It should be possible to overwrite the amount, provided the administrator does not enter any amounts under 8 euro or over 25 euro.

9. Set up a new wage type "Hourly Wage Bonus Moped ##" with the key ##60. You can use wage type MM30 as a template.

Customize the wage type so that the value is calculated from 10% of wage type ##50. The amount in the infotype should be relevant. Round up the wage type to the nearest euro.

Note: For notes on completing this exercise, see the unit on “Wage Type Structure”.

10. Hire another employee with the following basic data as of today using the hiring action HR305:

    Personnel number: **305996##**

    Position: **## Production Worker B** in organizational unit **## Production**

    Work schedule rule: **Norm**

    Pay scale group: **E01**

    Pay scale level: **01**

    Wage type: **##50**

    You can make entries of your choice for any data that has not been specified explicitly.

    Check whether the settings you made in exercise 3 have the expected effect:

    - Is the data for the enterprise or personnel structure pulled from Organizational Management?
    - Are the correct entries for pay scale type and pay scale area defaulted?
    - Can you select payroll area 60 + ##?
    - Can you select the administrator you created from the MP## administrator group?
    - Can you specify whether an employee is a Moped Craftsman ## or a Moped Master ##?
    - Is the corresponding entry pulled from the pay scale table when you enter wage type ##50? What is the range in which you can change the amount?
    - Is wage type ##60 calculated and rounded as you expected?

Exercise 4: * In your company, you have to check and change, if necessary, the attributes and interfaces of an infotype.

Use the infotype assigned to your group:

Group	Infotype Assignment	Group	Infotype Assignment
00	0007	16	0050
01	0009	17	0031
02	0105	18	0004
03	0022	19	2050
04	0015	20	2051
05	0027	21	2001
06	0002	22	2002
07	0014	23	2003
08	0008	24	2004
09	0017	25	2005
10	0019	26	2006
11	0040	27	2007
12	0041	28	2010
13	0077	29	2012
14	0001	30	2013
15	0016		

1. As there are now a lot of employees working in your company, you would like to see the employee subgroup to which an employee belongs in the header of the relevant infotype. Include this information in the screen header.

   For this, enter the following basic data:

   Your infotype has screen header number ## + 50 and your header modification number is ## + 30.
2. In the bottom screen area, hide a field of your choice and then show it again.
3. Include your infotype on your tab page “My Group ## ”(key 50 + ##).
4. Check the effect your settings have by creating a new record of your infotype for an employee of your choice.

   Note: For notes on completing this exercise, see the unit on “Infotypes”.

Exercise 5: * You need to create your own action in case the employment percentage in the Planned Working Time infotype (0007) changes. Use the following entry as the ID:

Group Course Partici-pants	Info Group	Action Type	Group Course Partici-pants	Info Group	Action Type
00	B0	F0	16	D6	G6
01	B1	F1	17	D7	G7
02	B2	F2	18	D8	G8
03	B3	F3	19	D9	G9
04	B4	F4	20	F0	H0
05	B5	F5	21	F1	H1
06	B6	F6	22	F2	H2
07	B7	F7	23	F3	H3
08	B8	F8	24	F4	H4
09	B9	F9	25	F5	H5
10	N0	G0	26	F6	H6
11	D1	G1	27	F7	H7
12	D2	G2	28	F8	H8
13	D3	G3	29	F9	H9
14	D4	G4	30	H0	K0
15	D5	G5			

The action should call the Planned Working Time and Basic Pay infotypes in copy mode.

Include the new action in transaction PA40 “Personnel Actions”. The action should only be displayed in your user group (50 + ##).

Run the action once for an employee of your choice.

Note: For notes on completing this exercise, see the unit on “Actions”.

Lesson Summary

You should now be able to:

- Understand better the content of this course by completing the exercises

Unit Summary

You should now be able to:

- Understand better the content of this course by completing the exercises

Course Summary

You should now be able to:

- Map your complete company and personnel structure in the SAP system
- Map your pay scale structure and perform standard pay increases and pay scale reclassifications
- Build your own wage type structure and set up the necessary prerequisites for payroll accounting
- Depict enterprise-specific processes in the infotype menus, personnel actions and dynamic actions

Appendix 1

Additional Information Material: Optional for USA and Canada Only

- This section contains supplementary material for reference purposes.
- This material is not part of the standard course.
- Consequently, the instructor might not cover this during the course presentation.

Content:

- mySAP Human Resources Concurrent Employment

Objectives:

- Define Concurrent Employment
- Describe benefit implications such as seniority calculations for concurrent employment
- View work schedules for concurrent assignments
- Discuss payroll processing considerations such as Overtime and Garnishment
- Determine payroll posting options
- Name new logical database required for concurrent employment

Business Scenario:

- A company has multiple facilities in the same city. Employees can hold positions concurrently in these facilities. Service should be combined and payroll considerations such as overtime calculations need to be available. Data entry clerks want to easily see all personnel assignments.

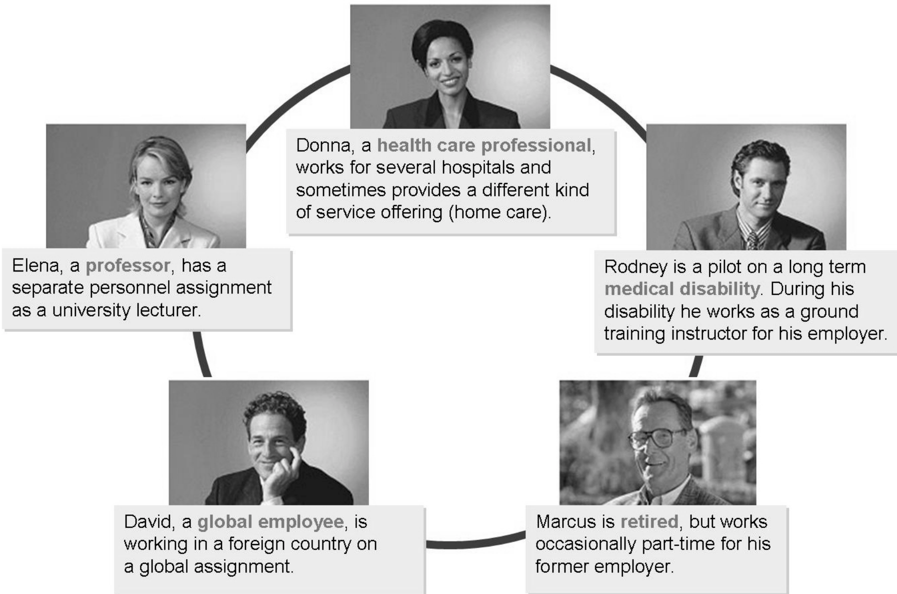


Figure 215: Examples of Concurrent Employment Situations

Concurrent employments allow one employee to hold multiple positions simultaneously and link those positions together through sync points for employment consideration such as time, payroll and benefit processing.

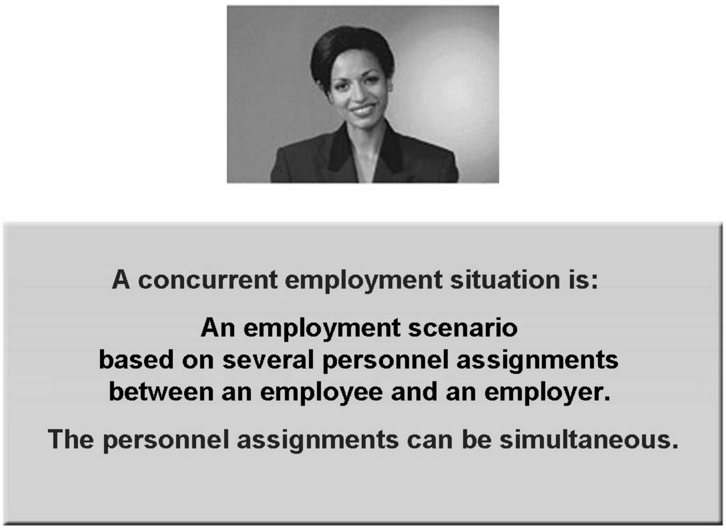


Figure 216: Concurrent Employment Definition

To accomplish this, new additions such as infotypes, header structures, time and payroll schemas, and a benefit workbench have been added to the Enterprise release to accommodate employment tracking and processing.

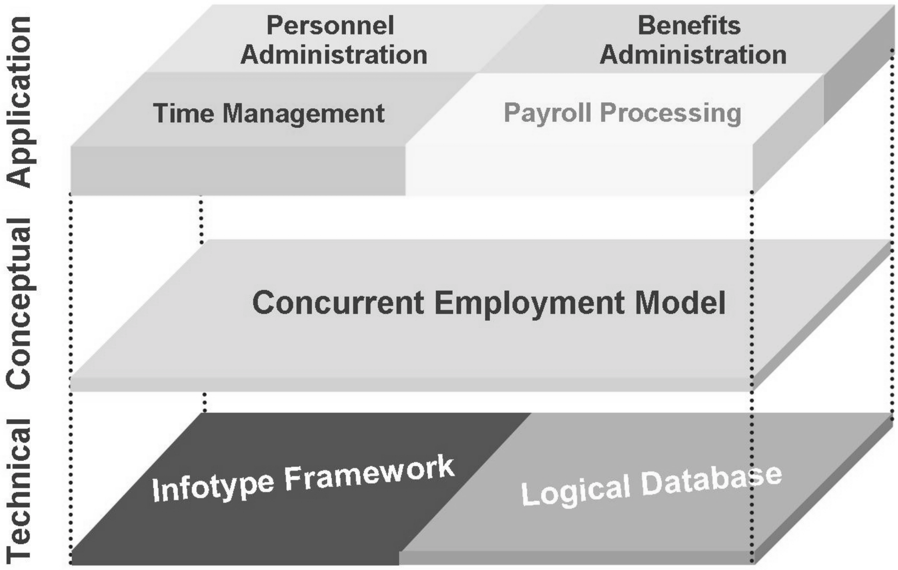


Figure 217: Concurrent Employment Solution at a Glance

The Infotype Framework allows you to have the user interface separated from the business logic, so that it becomes easier to build new transactions at infotype level, for example, similar to the transaction PA30, without having to deal with the dynpro logic. It supports the creation of new web applications, for example. The principle of data sharing is supported, thanks to the new infotype framework.

A new logical database (PNPCE) enables reporting based on the person or on the personnel assignment.

The concurrent employment model is a conceptual solution for CE using the available tools on HCM.

For the R/3 Enterprise release, the components Personnel Administration, Benefits, Time Management & Evaluation, and Payroll have been enhanced to support concurrent employment capabilities. This components have been localized for the US and Canada only.

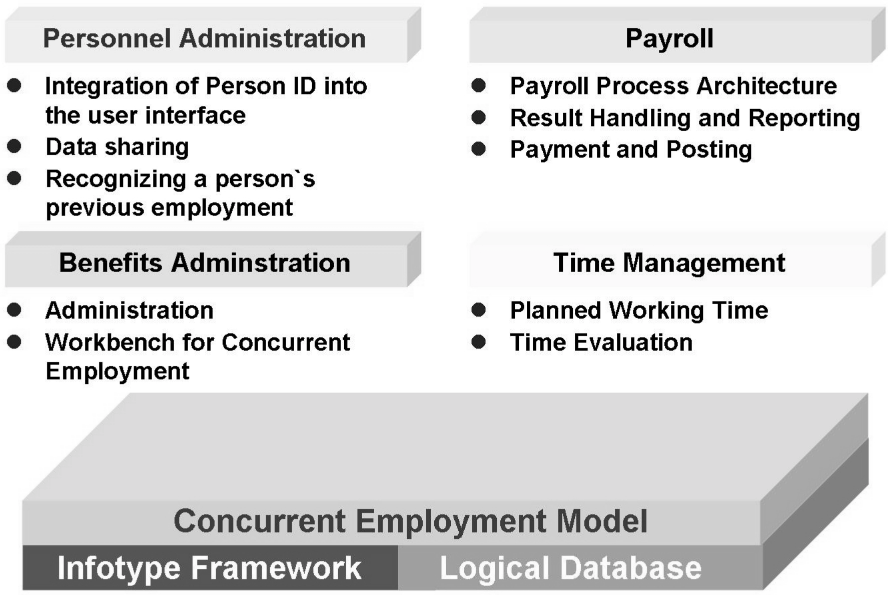


Figure 218: Concurrent Employment Solution at a Glance

Some highlights for each of the components. For example, for Personnel Administration the Person ID concept has been realized. Decisions are made during configuration as to which infotypes should be shared during additional assignment processing. New prompts have been added to alert data input clerks of a second assignment.

Under Benefits there is a new workbench to combine service from multiple positions for benefit eligibility. Time and Payroll schemas have been enhanced to sync up positions for processing and calculations such as overtime limits.

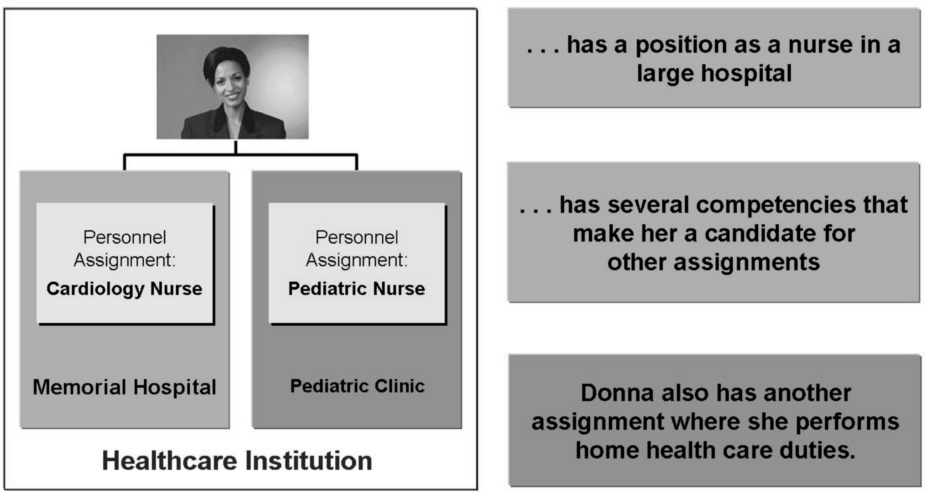


Figure 219: Donna, for example …

A example of an employment situation that requires concurrent employment capabilities.

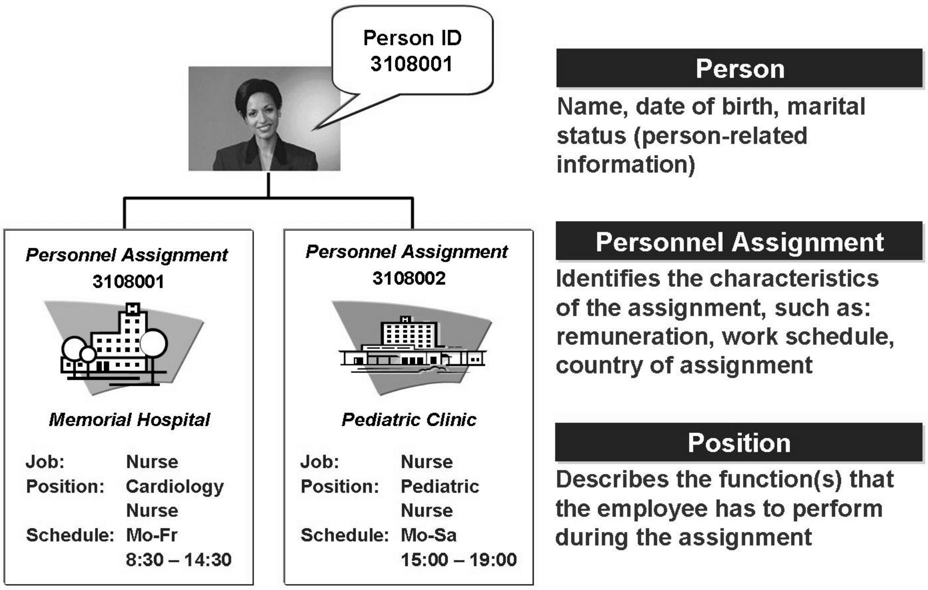


Figure 220: Concurrent Employment Model

Here we see three key parts of the concurrent employment model. The first is the person. The different personnel assignments are linked by the Person ID. Information about the person such as name, date of birth, address, and so on should be shared between the positions so that no duplicate data entry is required.

The Personnel Assignment identifies the characteristics of the assignments such as remuneration, work schedule, and country assignment.

The Position describes the function that the employee will perform during the assignment.

Handling Multiple Assignments

- The Person ID is used to track the individual within the entire enterprise for the life time of the employee.
- All previous employments of a person are automatically recognized.
- If all previous personnel assignments are currently inactive, this person is a rehire.
- Security is in place to guarantee that multiple users access information about the person according to their authorization level only.

In “Customizing”, it is defined which Infotypes and Subtypes should have “data sharing” of Person, Personnel Assignment and Employer.

If a person is identified as already holding a personnel assignment, the system links the new personnel assignment to the person and data sharing is established.

This enables the end user to maintain data that remains the same for one or more personnel assignments.

New Ways of Viewing and Accessing Person Information

- New features enable you to easily navigate from one personnel assignment to another of the same person.
- A new overview option enables you to have a list of all personnel assignments of a person.
- A summarization screen allows you to have in one screen an overview of all active personnel assignments of a person.

Once the appropriate configuration is made, you can easily see the personnel assignments on transactions such as PA20, PA30, and PA61.

Grouping of Personnel Assignments

- Personnel assignments can be grouped together for time and payroll processing as well as for reporting purposes.
- For example, a person can join a certain benefit plan if by combining his/her personnel assignments heor she meets the enrollment requirements.
- mySAP ERP 2005 comes with predefined rules to build groups of personnel assignments for common processing, but users can build their own rules.

There are valid reasons to group an employee's personnel assignments. Based on company policies and government regulations, there may be times when you want to add together hours from the concurrent assignments. Conversely, there may be times when this is not necessary. This decision is made in the grouping rules created during configuration. The grouping rules can vary. For instance, you can group for benefits differently than for time calculations.

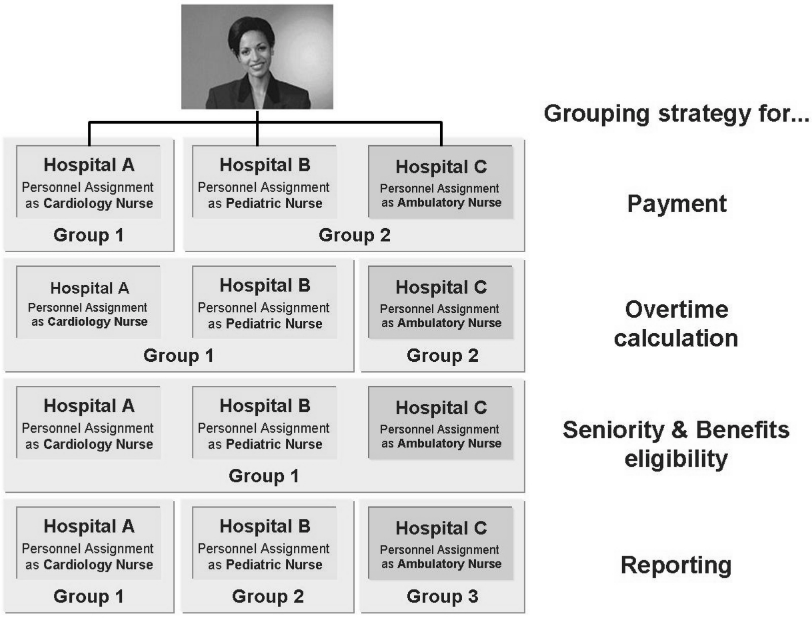


Figure 221: Grouping Examples

It is common practice and often company policy to group personnel assignments for different processes, such as payment, overtime calculation, benefits administration, and so on.

To group personnel assignments based on various criteria, you can use the *Grouping Editor*.

The examples shown in the graphic already indicate that the grouping of personnel assignments may differ from application to application or even within a certain topic so that the *Grouping Editor* needs to reflect different grouping scenarios for each application. It is customizable and relies on organizational data during the grouping process.

- **Business scenarios for grouping correspond to grouping reasons**
- **SAP delivers a set of grouping reasons**
- **You should not need to change grouping reasons**
- **You can define additional grouping reasons**

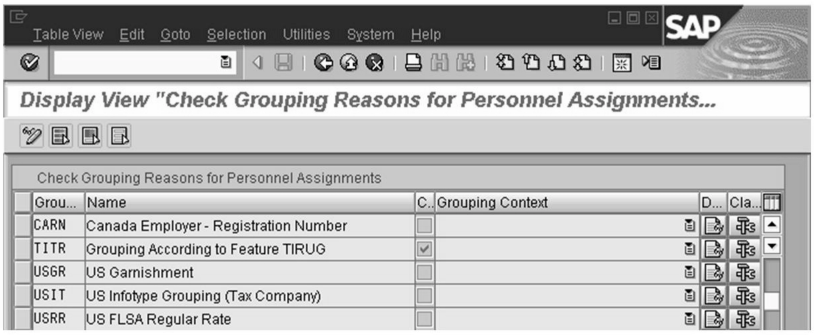


Figure 222: Grouping Reason

Typical grouping reasons are:

- All assignments of a person should be grouped together, for example, for storing the person ID.
- All assignments with the same country grouping should be grouped together, for example, for storing resident tax area data.
- All assignments with the same employer should be grouped together, for example, for tax reasons or for garnishments.

The settings are maintained in table “Grouping Reasons for Personnel Assignments” (T7CCE_GPREASON) in the IMG: *Personnel Management → Personnel Administration → Basic Settings → Basic Settings for Concurrent Employment → Editor for Personnel Assignment Groupings → Change Grouping Reasons*

Grouping contexts are used by some transactions in order to provide additional data to the grouping rules. That is, to provide some “context”. If the transaction does not provide the context, the rule will not be able to evaluate it even if it is maintained in this table. This is the reason why you should not change the assigned grouping contexts for the standard reasons.

It is expected that no changes to this table are required.

The “Changeability of Grouping Reason Assignment” indicator controls whether the assignment of grouping rules may be changed.

- **A grouping rule is a technical description of how to derive grouping values.**
- **It is linked to an ABAP Objects class which provides the implementation.**

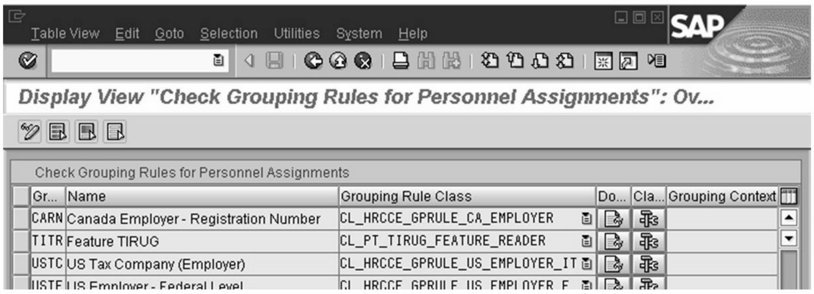
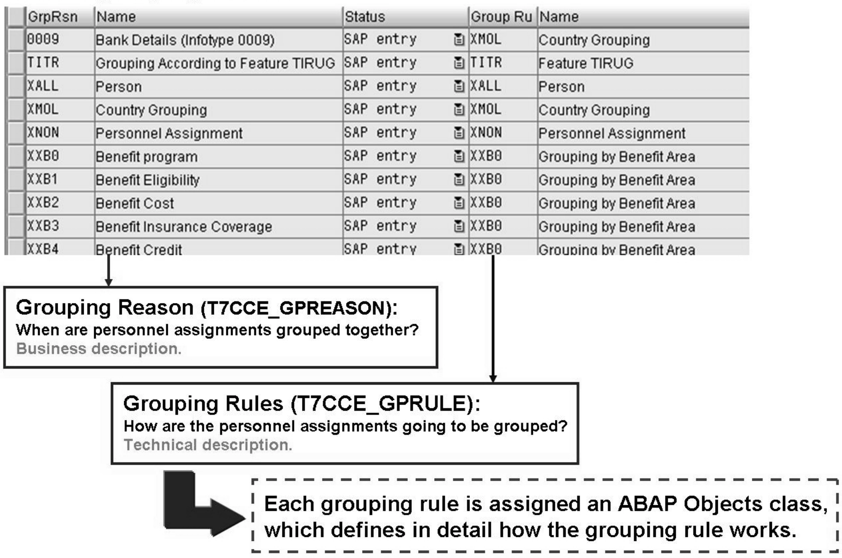


Figure 223: Grouping Rules

The settings are maintained in table "Grouping Reasons for Personnel Assignments" (T7CCE_GPREASON) in the IMG: *Personnel Management → Personnel Administration → Basic Settings → Basic Settings for Concurrent Employment → Editor for Personnel Assignment Groupings → Change Grouping Rules for Personnel Assignments*

- **Tables T7CCE_GPASG / T7CCE_GPASGM assign grouping rules to grouping reasons**



GrpRsn	Name	Status	Group Ru	Name
0009	Bank Details (Infotype 0009)	SAP entry	XMOL	Country Grouping
TITR	Grouping According to Feature TIRUG	SAP entry	TITR	Feature TIRUG
XALL	Person	SAP entry	XALL	Person
XMOL	Country Grouping	SAP entry	XMOL	Country Grouping
XNON	Personnel Assignment	SAP entry	XNON	Personnel Assignment
XXB0	Benefit program	SAP entry	XXB0	Grouping by Benefit Area
XXB1	Benefit Eligibility	SAP entry	XXB0	Grouping by Benefit Area
XXB2	Benefit Cost	SAP entry	XXB0	Grouping by Benefit Area
XXB3	Benefit Insurance Coverage	SAP entry	XXB0	Grouping by Benefit Area
XXB4	Benefit Credit	SAP entry	XXB0	Grouping by Benefit Area

Figure 224: Linking Grouping Reason to Grouping Rule

The "Assignment of Grouping Rule to Grouping Reasons" tables (T7CCE_GPASG and T7CCE_GPASGM) are evaluated to determine a Grouping Rule for a given Grouping Reason.

- Table T7CCE_GPASG contains country-specific entries. One of the key fields is MOLGA.
- Table T7CCE_GPASGM contains international entries.
- Both tables have the key field Status to distinguish SAP entries from customer entries.
-

Hint: Note: Any customer entry in this table will always be evaluated before the SAP entry. Country-specific entries have higher priority than international entries. Therefore, the evaluation order is:

  – Country-specific customer entry
  – International customer entry
  – Country-specific SAP entry
  – International SAP entry

The settings are maintained in the IMG at: *Personnel Management → Personnel Administration → Basic Settings → Basic Settings for Concurrent Employment → Editor for Personnel Assignment Groupings → Change Assignment of Grouping Rules to Grouping Reasons*

- **Infotype 0712 enables you to define a main personnel assignment that is required in certain applications.**
- **The subtype determines the grouping reason.**
- **There is a main personnel assignment for each group.**

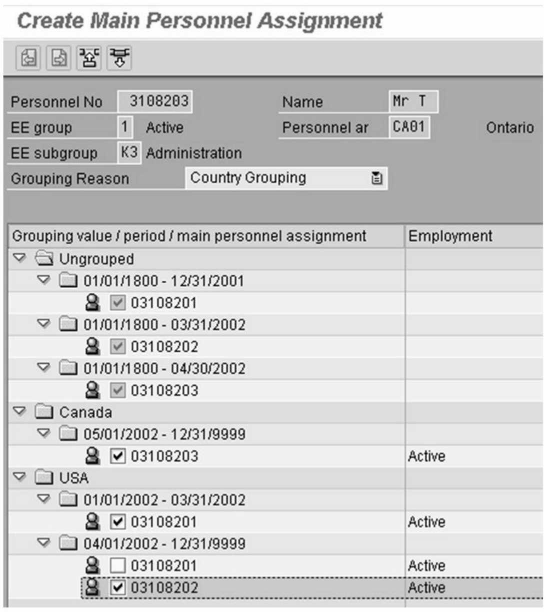


Figure 225: Main Personnel Assignment

Typical applications for the main personnel assignment are:

- To indicate which assignment of a benefits area holds the benefits information
- To indicate which assignment of a tax company group holds the main tax information

Some applications determine a main personnel assignment automatically if there is no IT712 specified

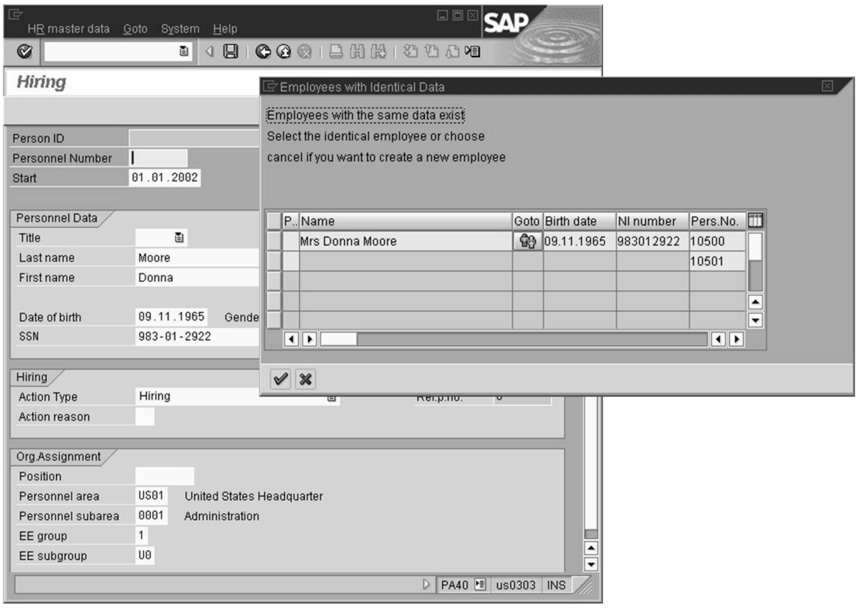


Figure 226: Recognizing Previous Employment

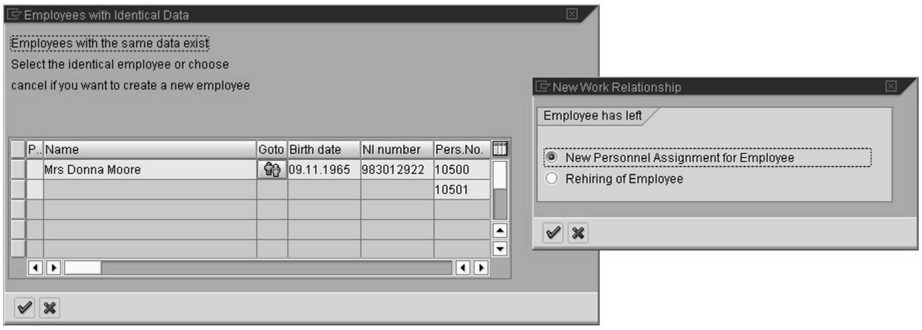
During the Hiring personnel action, the system tries to find out if there are previous and currently active employments for the same person.

By looking at the Social Security Number (USA) (field name PERID), last name, first name, and date of birth of the person, the system is able to recognize previous employment records of that person.

This means that the system will present all records matching your initial entries.

The user may confirm whether the person is the same or not:

- If the person is not the same person, then the action will proceed as in the non concurrent employment case.
- If the user confirms the entries as belonging to the same person, the system will continue with additional processing for concurrent employment (see next page).



- **The user selects an assignment of the person.**
- **If the selected assignment is active, the system always creates a new assignment.**
- **If the selected assignment has been terminated, you can either**
  - **Create a new assignment or**
  - **Create a rehire**

Figure 227: Rehire or New Assignment

In the “Employees with Identical Data” dialog box, the user needs to select an assignment from the list or cancel if he or she wants to hire a new employee.

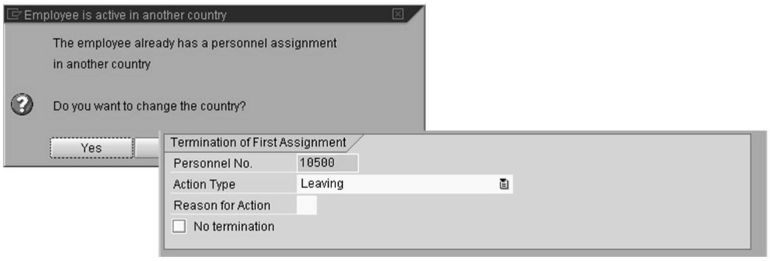
Since a person may have several assignments that might be terminated and active at the same time, it is important to know what kind of personnel action the user wants to perform:

- To create a new assignment for the person
- To rehire the person

If the user wants to create a new assignment for a person, he or she can select any assignment from the list. However, by choosing an active assignment, the “New Work Relationship” dialog box will not appear.

After you enter the appropriate entries, the system will continue with the desired personnel action (new assignment or rehire). Which infogroup will be presented for each personnel actions depends on the settings made in Customizing.

The personnel actions, “new assignment” and “rehire”, are stored with the logical keys ADDITIONAL_ASSIGNMENT and REHIRE.



- **If the system detects that the new assignment is in a different country, it asks the user if he or she wants to perform a "Country Change" personnel action.**
- **If the user runs a "Country Change" personnel action, the system offers to terminate the previous assignment.**

Figure 228: Country Change

The logical keys for the "Country Change" and the "Termination" personnel actions are HIRE_COUNTRYCHANGE and TERMINATION.

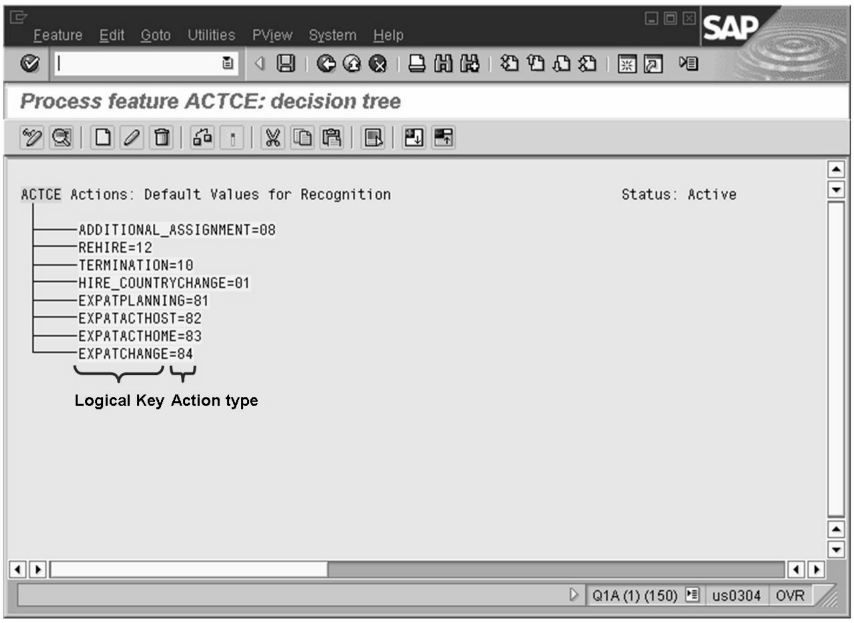


Figure 229: Customization Steps

With the help of the "Actions – Default Values for Recognition" feature (ACTCE), you determine how the system should react during hiring actions for employees for whom a personnel assignment already exists.

Customization for feature “Actions – Default Values for Recognition” (ACTCE) is maintained in the IMG: *Personnel Management → Personnel Administration → Customizing Procedures → Settings for Concurrent Employment → Actions for Concurrent Employment*

The logical keys are predefined. The first 4 logical keys (ADDITIONAL_ASSIGNMENT, REHIRE, TERMINATION, HIRE_COUNTRYCHANGE) have already been explained here.

The other logical keys correspond to the Management of Global Employees solution, which is handled in a separate workshop.

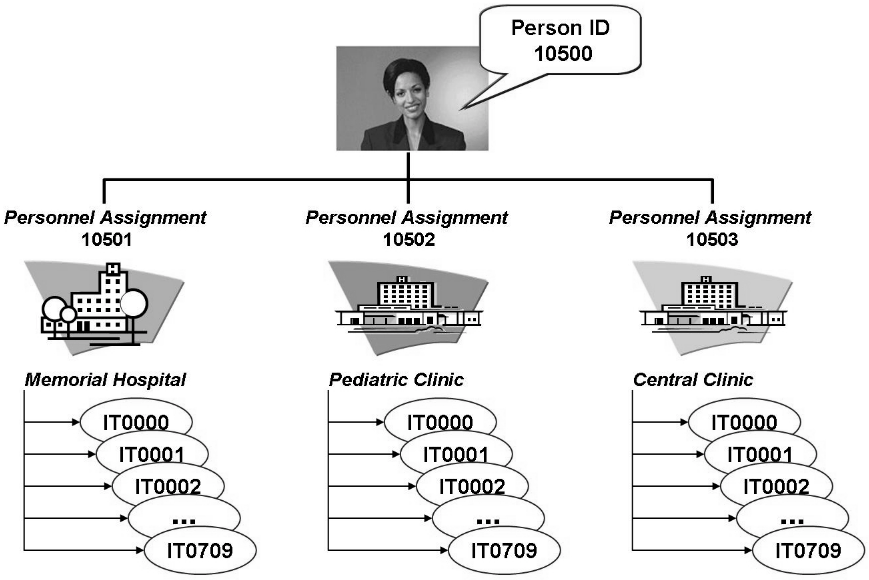


Figure 230: Data Sharing Principle

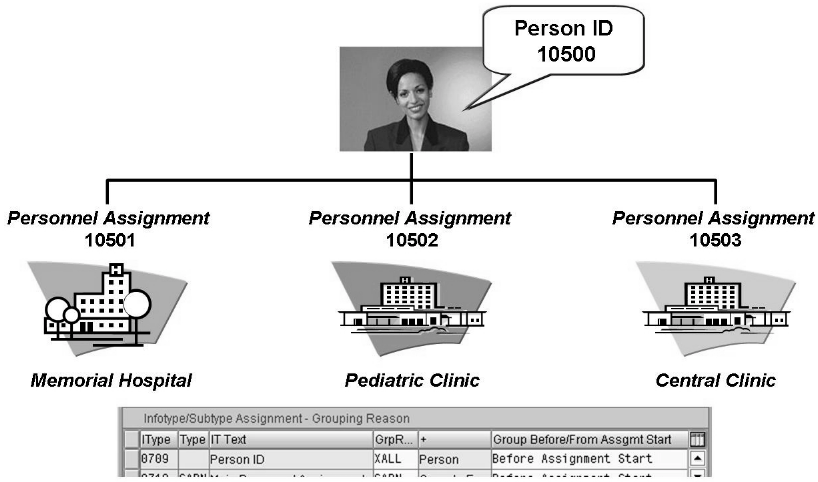
When you create a new personnel assignment for a person, data stored in a previous personnel assignment may be required for the new one.

To simplify data maintenance across all personnel assignments for end users, the system uses the data sharing mechanism.

Data is stored in infotypes, which always contain information specific to one assignment. If data needs to be specific for a group of assignments, the data sharing mechanism is applied.

There are different ways to share data:

- Among active personnel assignments only (see the Person ID example)
- Among all personnel assignments in one company (see the Tax Data example)



- **Since the person ID is the same for all assignments, the corresponding *Person ID* infotype (0709) is shared across all assignments.**

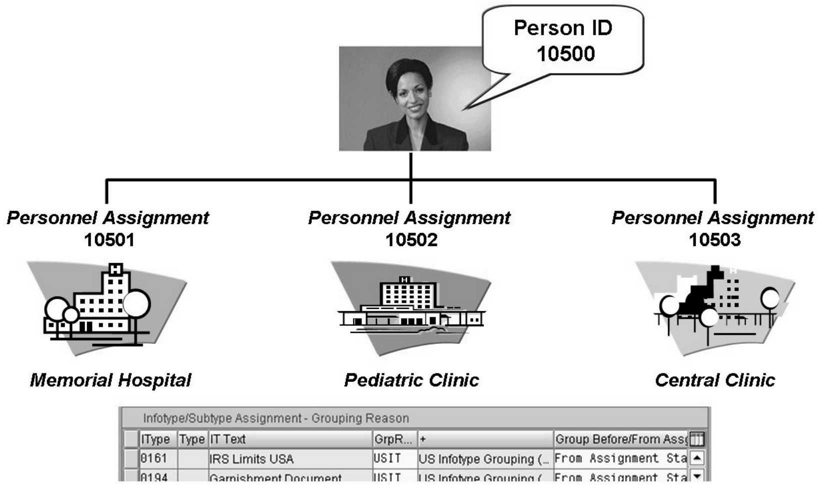
Figure 231: Data Sharing: Person ID Example

In this example, the records of the Person ID infotype (0709) should be same for all assignments. Technically, we want to group all assignments of the same person and then share the data in the infotype 0709 within the group.

Grouping all assignments together is achieved using the grouping reason “XALL”.

Customization is maintained for “Infotype / Subtype Assignment – Grouping Reason” (V_T582G) in the IMG:

Personnel Management → Personnel Administration → Customizing Procedures → Settings for Concurrent Employment → Copy Infotypes



- **The IRS Limits are different for different companies, however they are the same for assignments at the same (tax) company.**

Figure 232: Data Sharing: Tax Data Example

Grouping assignments with the same (tax) company together is achieved using the grouping reason “USIT” (US-specifc).

The entry in the last column indicates that no data should be shared before an assignment starts. If the entry is changed to indicate that the system should group before the assignment starts, the following happens:

- The grouping rule cannot determine a valid company before the start of the assignment since there is no infotype 0001 data present at this time. Hence the rule will deliver no grouping value. Since the system needs a value anyway, it uses the earliest value it can determine and assumes that this is the correct value.

If the grouping rule identifies a grouping value before the assignments starts, then the system uses this value. This is the case in the Person ID example.

Benefits Administration & Workbench for CE

Benefits

- Administration Personnel Assignments are grouped together based on the Benefit Area stored in the “General Benefits Information” Infotype.
- Personnel Assignments having the same Benefit Area are grouped together for further processing.
- Only one Personnel Assignment per Group can carry and process Benefit Plan information, the Main Personnel.

Benefits Workbench for Concurrent Employment

- Facilitates the administration of benefits
- Is the single point of entry for Benefits Administration
- Supports the adjustment reasons at person level

The additional Personnel Assignments of the same group are the“Secondary Personnel Assignments”.

They can contribute with parameters such as:

- Work hours
- Salary
- Seniority information

In this way, they influence the processing of the Benefits under the Main Personnel Assignment.

To be able to differentiate between Main Personnel Assignment and Secondary Personnel Assignments, the “General Benefits Information” infotype will be enhanced.

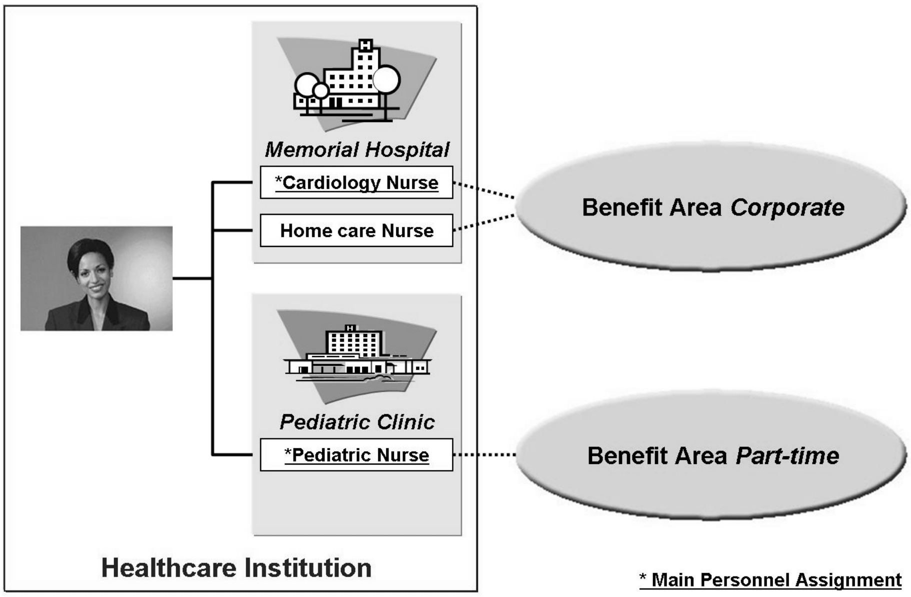


Figure 233: Main Personnel Assignment for Benefits

Usually, each personnel assignment is assigned to one benefit area. Personnel assignments sharing the same benefit area are grouped together for benefits calculation. For each benefit area, an assignment is defined as the main personnel assignment.

The employee can have a set of benefit plans for each benefit area. These plans are held by the main personnel assignment.

Hint: Personnel assignments can belong to the same benefit area only if they belong to the same payroll area.

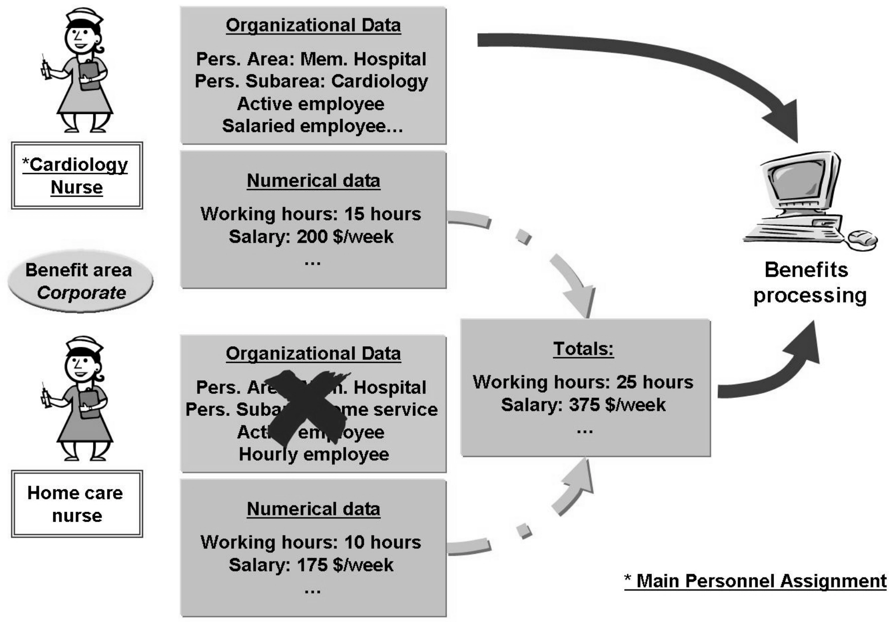


Figure 234: Grouping for Benefits: Consequences

Personnel assignments belonging to the same benefit area are grouped together for benefits. This means that the benefits of two personnel assignments are calculated taking into account data coming from both personnel assignments. Numerical data are summed together and organizational data are taken from the main personnel assignment.

Example:

- For the “Corporate” benefit area, an employee is eligible for a pension plan only if he or she works more than 25 hours a week. The working hours of all personal assignments belonging to the “Corporate” benefit area will be then summed together to determine if the employee is eligible for this plan.
- For the “Corporate” benefit area, only hourly employees are eligible for a given dental plan. If the main personnel assignment for this benefits area is a salaried employee, then the employee will not be eligible for this plan.

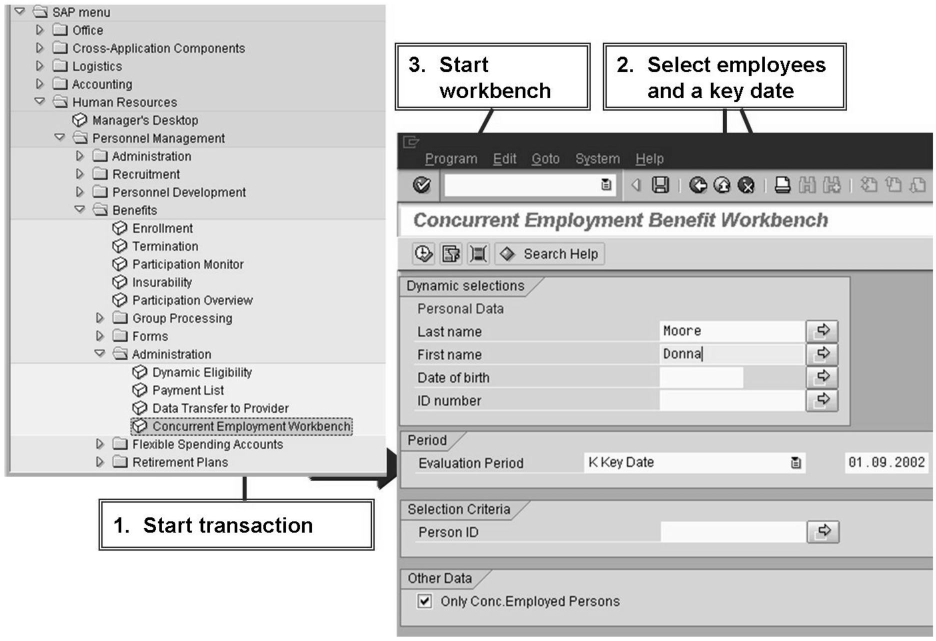


Figure 235: Concurrent Employment Workbench I

To manage concurrent employment situation for benefits, you use the concurrent employment workbench.

Start it in the SAP menu under: *Human Resources → Personnel Management → Benefits → Administration → Concurrent Employment Workbench*

Select the employees you want to process and start the workbench (F8).

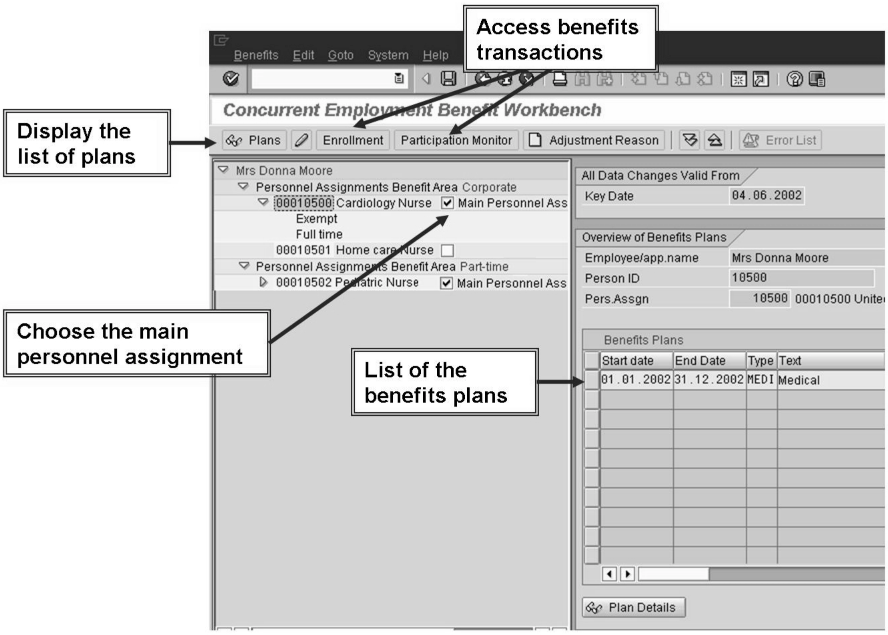


Figure 236: Concurrent Employment Workbench II

With this workbench you can assign multiple personnel assignments to a benefit area. For each benefit area you have to decide which assignment is the main one.

You can display the list of benefits plans for a main personnel assignment.

The workbench allows you to jump to the main benefit transactions.

All changes are made as of the key date. Information before the key date is retained but is delimited.

Example: An employee gets a new assignment. As a consequence of this, the employee should be allowed to change his or her benefits contributions. For this, you select the main personnel assignment and create an adjustment reason. Once the adjustment reason has been created, you can run the enrollment or the participation monitor to perform the necessary adjustments.

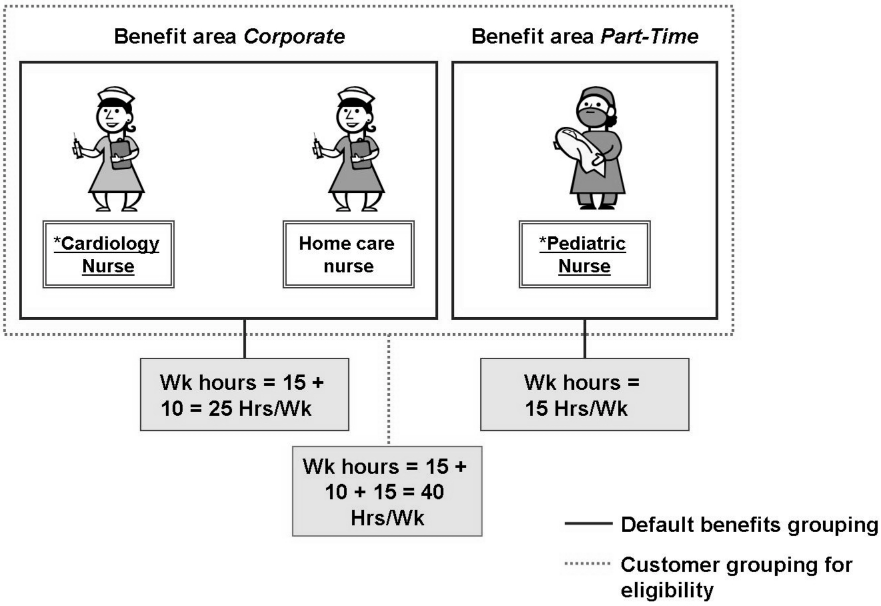


Figure 237: Implementing Your Own Groupings for Benefits

For the benefits processing, personnel assignments belonging to the same benefit area are grouped together. This is the case for eligibility where working hours of personnel assignments belonging to the “Corporate” benefit area are summed together. However, you can deviate from this rule.

For eligibility you might want to consider the working hours of all personnel assignments instead of the working hours of the personnel assignments of the same benefit area.

Example: An employee needs to work at least 30 hours in order to enroll into a Dental plan of the “Corporate” benefit area. In this case, if you do not replace the default grouping for Eligibility, only the working hours of the personnel assignments belonging to the “Corporate” benefit area are included, that is, 15+10 = 25 hours, which is not sufficient to enroll in the plan. If you set up the Eligibility grouping so that all personnel assignments are selected, the Working hours that will be considered will be: 15 + 10 +15 = 40 hours, which is enough to enroll into the Dental plan.

You can deviate from the standard grouping in several places in Benefits:

- Eligibility
- Cost
- Insurance Coverage
- Credit
- Contribution
- Combined Coverage
- Combined Contribution
- Adjustment Authorization
- Pension Plans Evaluation

Time Management

Planned Working Time – Managed at the Personnel Assignment level

- One work schedule (planned working times) at Personnel Assignment level
- Collisions of planned working times can be visualized through Time Manager's Workplace

Time Evaluation – Time evaluation rules can be processed for one personnel assignment or for groups of personnel assignments

- Overtime calculation
- Working time directives can be checked at Person level
- Absence quotas can be generated across multiple personnel assignments
- Verification of maximum leave entitlement across personnel assignments
- Time Evaluation is fully integrated to Payroll processing

With mySAP HCM Time Management in concurrent employment situations, it is possible for the time administrator at the healthcare institution to view Donna's work schedule in one simple report. Additionally, HR personnel at both the Pediatric Clinic and Memorial Hospital can monitor her work independently.

In addition, mySAP ERP 2005 Time Management in concurrent employment situations allows the combining of work schedules under different views. This allows time management administrators to catch any scheduling conflicts and prevent overstaffing. This information empowers administrators to make the right staffing decisions on a case-by-case basis.

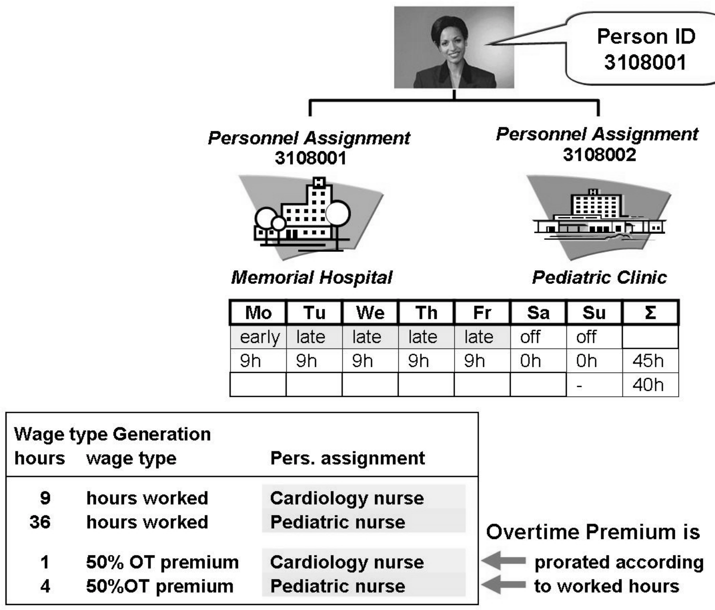


Figure 238: Overtime Rule Applied to Multiple Personnel Assignments

Additionally, mySAP ERP 2005 Time Evaluation is completely integrated with mySAP ERP 2005 Payroll, which considerably simplifies the process of paying employees with multiple personnel assignments.

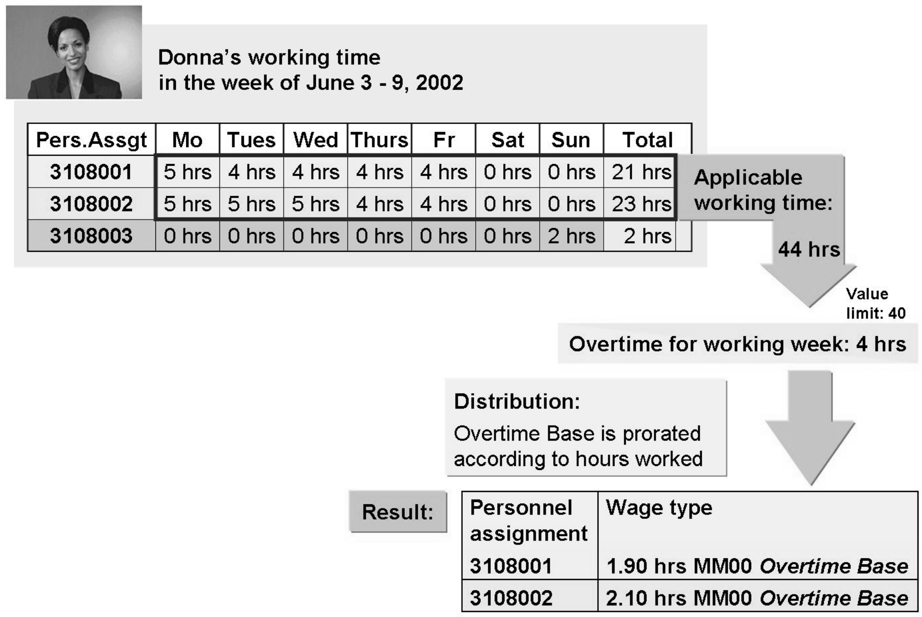


Figure 239: Example: Weekly Overtime Regulation II

Donna's personnel assignments with the Healthcare Institution are analyzed jointly to determine the applicable weekly working time. mySAP ERP 2005 totals the times she worked on these two personnel assignments and compares the total with the joint value limit. The working week must be the same for both personnel assignments.

The wage type resulting from the hours of overtime is distributed over the two personnel assignments she has with the Healthcare Institution. You can use distribution methods to determine how you want it to be distributed.

Work Schedules

- **Work schedules are entered on personnel assignment level**
  - Services for compiled work schedules
  - Checks and special views for joint work schedules

Absences, Quotas, ...

- **Absences, attendances, and quotas are entered on personnel assignment level**
  - Actual times are recorded for each personnel assignment
  - Attendance/absence quotas apply for each personnel assignment
  - No collision checks

Time Evaluation

- **Specific time management rules can be applied to any group of personnel assignments for one employee (person)**
  - Employer level
  - Person level
  - ...

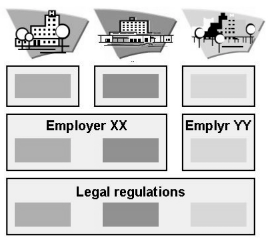


Figure 240: Concurrent Employment with mySAP ERP 2005 Time Management

Time management regulations can be processed over multiple personnel assignments in Time Evaluation only.

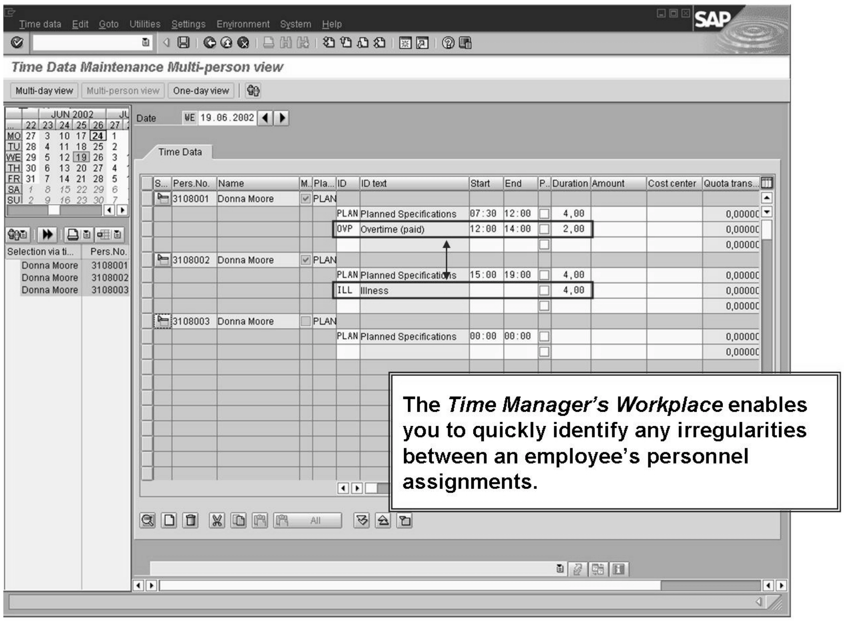


Figure 241: Time Data Administration Using the Time Manager's Workplace

There are currently no functions especially for recording the working times of concurrently employed persons in the Time Manager's Workplace.

You can, however, use the Multi-Person View and the Temporarily insert employees function to call up all of an employee's personnel assignments and process the time data jointly.

We recommend you to use the Time Manager's Workplace to administer time data for concurrently- employed persons. The Multi-Person View displays all information relevant to the various work schedules of the concurrently-employed person. This means that you can avoid collisions between work schedules and with the time data in the employee's other personnel assignments.

It is especially useful for identifying irregularities, for example, if an employee has reported sick for one personnel assignment to be able to work overtime for the other personnel assignment.

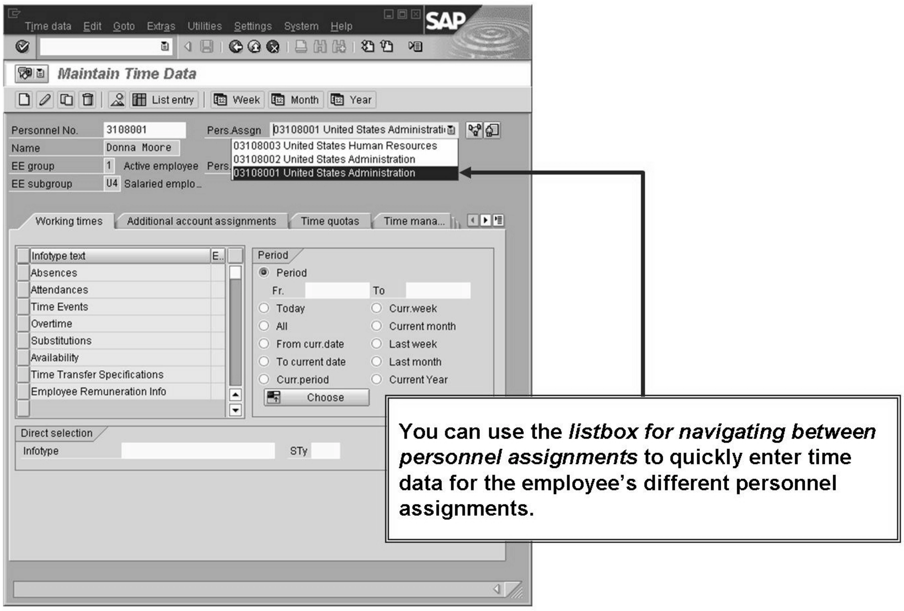


Figure 242: Time Data Administration Using the Maintain Time Data Transaction (PA61)

If you use the *Maintain Time Data* function, the *Pers.Assgn* field and the *listbox for navigating between personnel assignments* show an overview of all of the employee's personnel assignments.

Hint: The *Maintain Time Data* transaction (PA61) is not being developed further. You are therefore advised to use the *Time Manager's Workplace*, which has a considerably more comprehensive range of functions.

Payroll Processing

New payroll process architecture

- Enables you to run payroll for multiple personnel assignments
- Identifies person-related processes
- Includes synchronization mechanism
- Contains a new payroll log

Payroll results and reporting

- New ways to visualize payroll results, at person level or at personnel assignment level
- New logical database enables you to report on the Person or on the personnel assignment

Payroll payment and posting to accounting

- Build a group of personnel assignments for the payroll payment
- Posting on person level or personnel assignment level

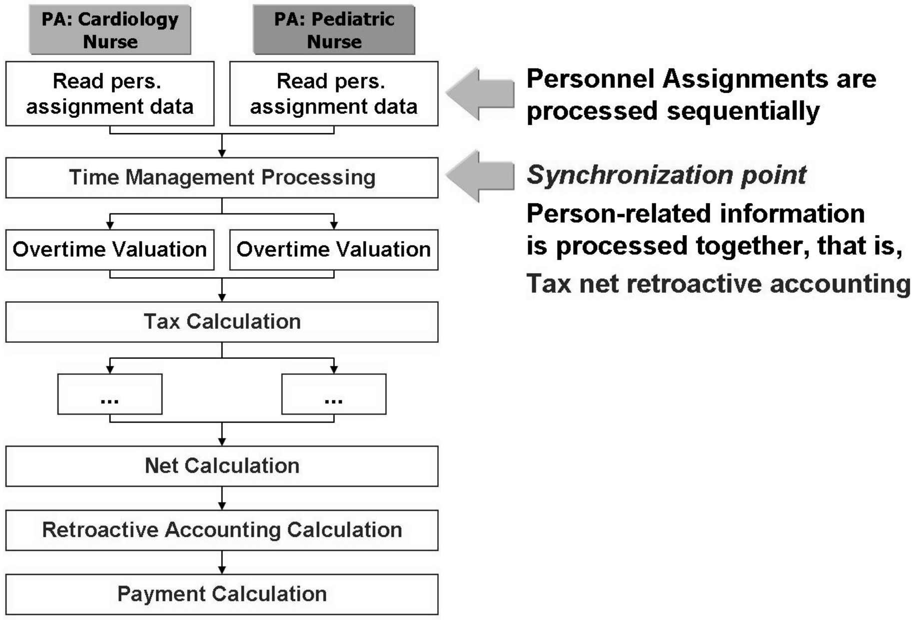


Figure 243: Payroll Process Architecture

In a CE Environment it is often necessary to run payroll simultaneously for each personnel assignment. This is now possible thanks to a new payroll architecture

The parts of the payroll process that are person-related are processed together in a synchronization point. For example, in the chart above, the Tax, Net Calculation, Retroactive Accounting Calculation, and Payment Calculation processes are performed simultaneously at synchronization points

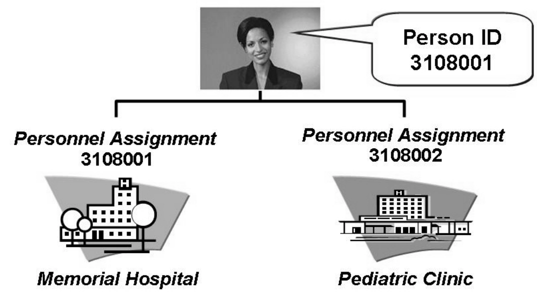
Payroll Result (PR)

Personnel assignment result (PAR)	Personnel assignment result (PAR)	. . .	Person Result (PER)

- **The outcome of a single payroll run is called payroll result (PR).**
- **The outcome of a payroll run for a personnel assignment is called the personnel assignment result (PAR).**
- **The common outcome of a payroll run with multiple personnel assignments is called the person result (PER).**

Figure 244: Payroll Results

The calculation of payroll results for concurrently employed persons depends upon the totals of the individual assignments. To avoid erroneous or redundant payroll results, mySAP ERP 2005 distinguishes among payroll results as shown in the diagram above.



Payment group:

- **One payment, one bank transfer**

Expenses and liabilities can be posted from:

- **Personnel assignment**
- **Group of personnel assignments (person)**

Figure 245: Payment Group and Posting to Accounting

The payroll results contain information that is relevant to the accounting department. For this reason, these results must be forwarded to accounting. The interface between payroll and accounting helps to:

- Group together relevant posting information from the payroll results
- Create summaries of important documents
- Perform the relevant postings in the accounting components, such as the general ledger accounting and cost accounting components

The posting capabilities of mySAP ERP 2005 Payroll can also post expenses and liabilities assigned during payroll to either a personnel assignment or a group of personnel assignments. In the latter case, a main personnel assignment must be defined. This will help to:

- Define the cost assignment for expense postings
- Assign the company code and business area of postings to clearing accounts, both for the payroll and the payment posting
- Derive the paying company code
- Determine the house bank and house bank account used for the payment along with the paying company code

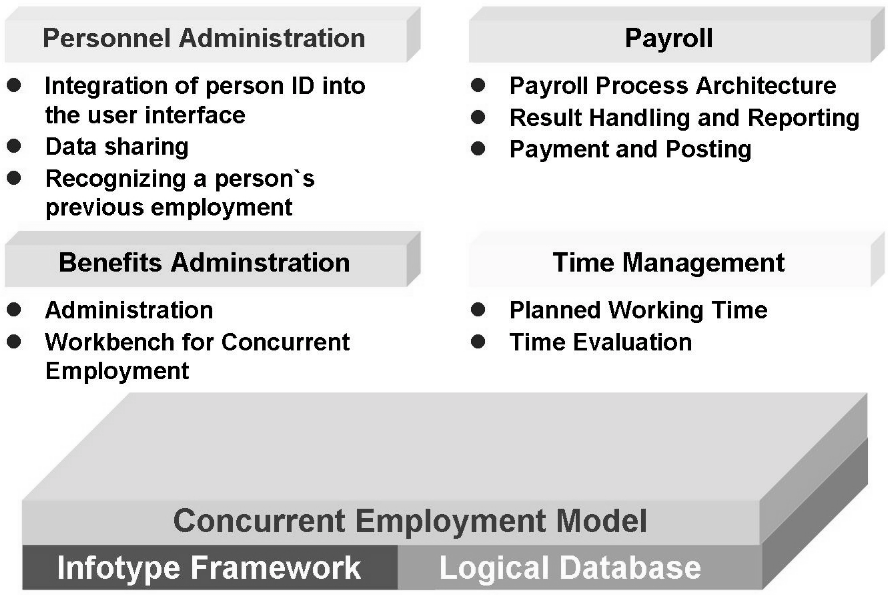


Figure 246: Summary: Concurrent Employment Solution at a Glance

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Feedback

SAP AG has made every effort in the preparation of this course to ensure the accuracy and completeness of the materials. If you have any corrections or suggestions for improvement, please record them in the appropriate place in the course evaluation.